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The April Revolution and the Contribution  
of Education to Changing 'Portuguese Realities'

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Part Three

## Chapter 5

### National Independence and 'Portuguese Realities':

#### a project for the school (?)

In its own pessimistic way, the following quote, which offers the point of view of a young student, suggestively outlines the post 25 April 'phases' we have elaborated so far in our examination of education and the Portuguese revolution, namely, 'power to the schools' - the democratic management of schools -, 'cultural "dynamization"' - the MFA as a front for national liberation -, and 'normalization':

'After the 25th of April the dominant class did not have a clear societal project; it was very divided; there was a lot of confusion; political forces did not question the social functions of the school, they limited themselves to measures of repair that had little effect; no one was capable of expressing that which was basic to the student movements, and in 1975 they ceased to exist. Then there was a period in which the school became the plaything of political parties, even for those of the Left. In 1976, with Sottomayor Cardia, the inevitable normalization occurred, but it was essentially political and without necessary rationality. There took place a political normalization of the school which still has no project. Only a short while ago with the recipe of the World Bank and with a certain consensus of the dominant class did a project for the school develop, adapting itself to the prolonged economic crisis.' 1

We have, of course, now arrived at the final stage, that termed by the student Ramalho 'a project for the school', supposedly set out under the auspices of the World Bank and 'a certain consensus of the dominant class'. Immediately, a number of questions provoked by Ramalho's intervention come to mind - perhaps their enunciation can serve as an opening to the main topic of

this chapter: the possible revival of a technocratically-oriented external dynamic in Portuguese education.<sup>2</sup>

To begin with, what precisely is this 'project for the school' that has been developed? At the end of the previous chapter we spoke of the link education-democracy in a new community context as the core element of the process of democratization of education over the last decade in Portugal.<sup>3</sup> Is there any reason to suspect incompatibility between this democratic process and World Bank, or other external, participation in Portuguese education?<sup>4</sup> Ramalho, above, links the World Bank, the dominant social class and a project for the school. What relationship exists between the World Bank and the dominant social class? How is this new project for the school 'adapted to the prolonged economic crisis'? Does this imply that the World Bank, as a sort of international crisis-management agency, has as its main objective in Portugal the re-orientation of the Portuguese school to meet the needs of national and international capital? Finally, and somewhat rhetorically, was normalization inevitable?

The answer to the last question must be 'yes, it was', if one means simply the need for a certain regulation and regimentation of the spontaneity, the burst of passion, that was the revolution itself. It then follows that normalization was necessary to allow for the concretization of the ideas the revolution had made possible. But did there exist, as some official reports have insisted,<sup>5</sup> a 'collective desire' among the Portuguese population that 'things return to normal'?<sup>6</sup> And even if it is admitted that what is 'normal' after a revolution is problematic - 'revolutions are inherently dynamic: they take time to unfold, and they are not

settled overnight'<sup>7</sup> -, might not a call for the 'ordering of liberties' simply be a euphemism for the 'restoring of order'?<sup>8</sup> The key question is (as always) what order? To put it bluntly, did the 'ordering of liberties' in fact imply the shelving of the societal project that was 'democratic socialism'? Officially, the situation was described by the Ministry of Education as one of 'transition',<sup>9</sup> and it was admitted, somewhat resignedly, that 'orientations (...), although good in themselves, had not produced the expected results.'<sup>10</sup> But there was no explanation of what was meant by 'transition', nor of which 'orientations' were 'good in themselves', nor why the 'expected results' were 'not produced'. Such questions were left, unfortunately, unanswered; in fact, they were purposely never even raised, for raising them would have prolonged the debate.<sup>11</sup>

#### The World Bank as an International Organization

To start finding answers to some of the questions posed above, a close look at the important role that the World Bank and other international organizations, such as the IMF, the EEC and EFTA have played in redirecting the orientation of the Portuguese state is essential. In our opening chapter we briefly introduced this theme. Here, we would like to discuss the activities of the World Bank in particular, but also, more generally, of all international aid organization, as a back-drop to a close, more specific, look at the question of national independence in Portugal and at the influence of the World Bank in the design of a project for the school. This discussion will lead us eventually to a consideration of the possibilities of a continuation and extension (or, on the

contrary, reversal) of the process of democratization in Portuguese education, a process that began with the Veiga Simão Reform and that was extended by the April revolution.

The World Bank operates, naturally enough, as a bank, with most of, if not all, the economic and administrative rationality that such operating entails. It maintains as its raison d'etre a policy of efficient allocation of resources and as an ultimate aim the reduction of the gap between the 'rich nations' and the 'poor nations'.<sup>12</sup> (At times it appears as if the Bank believes the former will, by itself, lead to the latter.) Its education policy<sup>13</sup> has been typically termed a 'banker's concept of education'<sup>14</sup> where education is seen primarily in terms of its relationship and importance to the economy:

'Conventional rationale for aid has rested squarely on human capital theory. In the words of the Policy Paper (1980), "the development of human resources not only helps alleviate poverty, but also contributes significantly to growth in national productivity and income."' 15

Inevitably, its economic preoccupations have been passed on to its clients, for even applications for aid require rationalist planning procedures.<sup>16</sup>

The World Bank offers not only aid in the form of loans but also advice and expertise. It differs therefore from an organization like the OECD which limits itself to the latter, and from multinational corporations, which, as Dale has pointed out,<sup>17</sup> in their search for profit-oriented investment are only incidentally interested in the relationships they establish with the countries in which they invest. For both the World Bank and the OECD, benefitting the recipient country with aid or advice is supposedly the point of the whole exercise.

Generally, however, the most forceful criticism directed at the World Bank, and at other aid and/or advice-offering international organizations, is precisely that recipient countries do not, in fact, benefit from international aid and/or advice. The main target of this criticism has been what Dale and Wickham<sup>18</sup> have termed the 'aid paradigm' (read modernization theory), the sequences of which may be described as follows: 1) recipient countries (to be) are deemed worthy, by their already modern 'superiors', to receive assistance (although their 'underdevelopment' is looked upon as failure<sup>19</sup>); 2) the future 'development' of the recipient country is identified with the development of the donor (already modern) country (or donor country model); and 3) aid is considered to be the missing ingredient that can trigger off the development process in the recipient country. The grande finale to the whole process is the completion of the equation: 'physical capital plus human capital equals growth'.<sup>20</sup> The production of human capital in this 'technical-function theory',<sup>21</sup> serves a dual purpose: on the one hand it provides the qualified manpower needed for economic growth, and on the other it assures the necessary transformation of values essential to the modernization process. Thus, 'becoming modern' involves both 'a fundamental resocialization process for each individual and across the nation as a whole', and 'the effective and efficient selection and allocation of appropriately talented and trained manpower for the modern sector'.<sup>22</sup> It seems hardly necessary to point out that this 'aid paradigm' has been accused of leading to the assumption that

'(...) the attitudes and values of the underprivileged sectors of (the developing)

society are obstacles to improving production within (the) society generally,' 23

or, paraphrasing Dale, that 'traditional man' - particularistic, ascriptive, diffuse - is the same as 'obstacle man'.<sup>24</sup>

The chief opposition to the 'aid paradigm', dependency theory, argues that it is precisely the donor countries, either directly through bilateral aid programmes, or indirectly through international organizations, that are the real beneficiaries of international aid, advice and expertise. Aid, it is argued, eventually works its way back, with increased value, to the donor countries. Further, aid is imperialistic: it contributes to the structured economic dependence of the developing countries on the developed ones.<sup>25</sup> This is accomplished, in the case of international organizations, either through the 'promotion' and 'rationalization' of an 'exclusionary and exploitative' development policy serving and maintaining the (ultimately) profit-seeking interests of the dominant classes of advanced capitalist countries,<sup>26</sup> or the international organization is seen simply to be a 'servicing agent' of the 'capitalist-world economy'.<sup>27</sup>

In fact, the reproduction of a dependent formation is not quite as straightforward as dependency theory implies. While it is true that the relationship between international organizations and national education systems 'puts in question the notion of the nation as an autonomous unit',<sup>28</sup> it does not follow that these organizations assure the disappearance of nations altogether. National identity, the affirmation of a closely-knit shared cultural and linguistic heritage, has effects in spite of (and often even because of) the intervention of international organizations, and its reproduction is a complex process which cannot be reduced to

the economic class interests of a metropole bourgeoisie (the school being left to reflect 'the power and educational needs of the colonizer'<sup>29</sup>). What comes from abroad, be it capital, technology, or ideas, must undergo a process of national interpretation and absorption that inevitably affects its application in the recipient country, regardless of the intentions and/or interests of the donor country or donor organization. Therefore, there must be a major problem with holist, exchange relations-based approaches which invariably contain

'(...) the troubling assertion (...) that national units are "non-systems" and that the domestic policies of nations are constructed over time by world-market relationships.' 30

Below we hope to demonstrate the effects of national identity on the definition of national priorities and patterns of educational design through a comparison of two different periods of recent Portuguese history, during both of which there was considerable participation of international organizations.

International organizations may actually be more important as supports for capitalist ideology than as instrumental agents of capitalism.<sup>31</sup> From this viewpoint, the intervention of international organizations is primarily to 'aid' education in its socializing, reproductive function, thus easing the way for the establishment of ideological and political foundations which support the claims of capitalist penetration as a superior form of production within the same formation.<sup>32</sup> While this conception of the nature of the activities of international organizations does not, in the end, answer the critics of economic determinism - i.e. one substitutes for a structured dependency based on exchange relations a structured essence which is the capitalist mode of production, capable

of producing the forms necessary (international organizations, for example) for its own reproduction and expansion - it does add sophistication to the analysis of the process of their intervention, for it enables one to distinguish different capitalist social formations.

The same may be said for Offe and Ronge's approach to the problem.<sup>33</sup> They argue that questions involving the use of power must be mediated by the state. The state is given a structural importance which prohibits it from becoming the tool of any one class - it is a wholly definable political-power structure which makes possible the domination of the bourgeois over the proletarian, but is neither identical with it, nor determined by it.<sup>34</sup> Therefore an instrumental role for international organizations as agents of a particular economic class is out of the question, for such an approach involves conceiving the economic system as a domain institutionalized beyond the state.<sup>35</sup> Rather, mediation of power by the state leads one to conceive international organizations as generally contributing (via a political system that must deal with three main system problems: maintaining accumulation, order-security, and legitimation<sup>36</sup>) to the reproduction of the conditions necessary for the continued operation of the capitalist system.

Once again, the problem of exaggerated importance being given to the economic sphere in the shaping of social and political relations is not solved by Offe and Ronge's approach, for their analysis conceives state action in terms of its capacity to structure social relationships as economic relationships. Thus, international organizations are supported by the state for the purpose of guarding commodity forms. Still, conceiving international organizations as supports for capitalism, either via the support

they may give to the claims of capitalism, or via their role in the reproduction of the conditions necessary for capitalism - in spite of the fact that, in the end, these approaches, too, may 'make opaque the socio-cultural differences between capitalist formations',<sup>37</sup> - is an improvement on dependency theory to the extent that it allows one to begin to make differentiations, by considering the degree of capitalist penetration or by taking into account the different forms of state action arising from the state's need to guarantee state functions; although such sophistication may, it must be said, cause one to sacrifice the political force of dependency theory's direct and unmistakeable message.

#### International Organizations and the Question of Portuguese National Independence

Former Prime Minister Vasco Gonçalves, reflecting on his experience as head of four Provisional Governments (2nd, 3rd, 4th and 5th), wrote the following:

'The experience of the Provisional Governments (except for the Vith) showed that it was possible for Portugal to practice a policy of national independence (Article 7 of the Constitution foresees the abolition of all forms of imperialism and the creation of an international order capable of securing peace and justice in relations between peoples; Article 9, section a, says the state is to guarantee national independence and create the conditions - political, economic and social - necessary for it). The profound transformations that occurred in the socio-economic structure prove that this was so, as do the decolonization process, and the opening and development of relations between Portugal and the socialist countries and the countries of the Third World. Proof is also found, negatively, in the fact that the governments of Western Europe,

and of the U.S.A., of the countries of the EEC and EFTA, only came to consider political conditions favourable for agreements with the Portuguese Government after the fall of the Vth Provisional Government.' 38

The VIth Provisional Government took office in September 1975.

More than a year previously (and only three months after the April coup d'etat), on precisely July 20th, 1974, the newspaper O Expresso carried the following news item:

'News from reliable sources affirms that negotiations have been cancelled for a loan of 400 thousand "contos" (39) with the World Bank. The World Bank, which for political reasons never had with Portugal, or any of its overseas colonies, any direct dealings, seems now, to show a tendency for a similar attitude for opposite reasons.' 40

In November of 1974, also according to the newspaper O Expresso,<sup>41</sup> a Vice-President of the World Bank visited Portugal, but nothing concrete resulted from the visit. Only in May, 1976, did news of World Bank activities once again appear in the Portuguese press: on the 22nd of May O Expresso announced a plan by the World Bank to 'finance small and medium Portuguese firms'. Finally, on the 3rd of July, 1976, there appeared notice, again in O Expresso, of plans for the intervention of the IMF in the Portuguese economy, apparently to 'finance Portugal's balance of payments deficit'.

In actual fact, negotiations with international organizations were initiated by the Portuguese Government immediately after the 25th of April, 1974.<sup>42</sup> Both EFTA and the EEC were contacted not only for aid, but also to make the necessary adjustments to Portugal's relationship with them in the light of the new situation created by the sudden change of regime. Concrete measures, however, were only forthcoming in the latter part of 1975, after a

series of warnings had been delivered regarding the turn of events in revolutionary Portugal: from the EEC -

'(...) on July 17, 1975, when the MFA radicals were on the verge of replacing civilian government totally, the Council (the EEC's Council of Ministers) (...) stated that the Community "could only give its support to a democracy of a pluralist nature"', 43

and from EFTA -

'EFTA's Consultative Committee discussed the Portuguese situation in September 1975 and concluded that if EFTA helped Portugal, it would have to be sure that the aid would go to a democratic society and that foreign investment would be protected.' 44

By the end of 1975, Portugal had, for all practical purposes, severed colonial links with its former possessions (or, rather, they had severed links with Portugal).<sup>45</sup> Thus, more than ever, the international sector (which meant with the onset of the VIth Provisional Government - September, 1975 - Western Europe and the U.S.A.) appeared vital as Portugal's fledgling, now pluralist-oriented, democracy set out to restructure society, reorganize the economy and raise the standard of living.<sup>46</sup>

IMF intervention in Portugal began in 1976, but its major package only arrived in 1978.<sup>47</sup> An important point about IMF loans, often more important than the loans themselves, is that they

'(...) are supposed to function as a signal to commercial banks, and even to official lending agencies, that the borrowing country has instituted an acceptable (sic) "stabilization" programme, that its credit-worthiness has been restored, and that loans to its Government can be resumed.' 48

In Portugal's case, the IMF loan of 1978 may well be interpreted

as having guaranteed, above all else, a return on the part of Portugal to fiscal orthodoxy (as part of a wider programme of the normalization of the economy), after a revolution which had seriously put in question Portugal's international 'credit-worthiness'.<sup>49</sup> If we adopt this position, then it becomes clear that this 'return to fiscal orthodoxy' (under IMF guidance) took place very much along the lines predicted by Murteira in his Strategy C referred to in the last chapter.<sup>50</sup> Indeed, seen in these terms, the very terminology employed by the IMF to name its package, i.e. 'stabilization', reveals itself as very effective in concealing the loan's negative (in the perspective of the April revolution) effects: namely, reduction of the level of real wages, reduction of the level of aggregate demand and reduction of the degree of government intervention in the market.<sup>51</sup>

It has, in fact, been argued that the sort of strategy employed by the IMF in Portugal was almost certainly originally designed with capital-exporting countries in mind:

'(...) the Fund's financial mechanisms were designed to cope with a typical problem of industrialized economies: to provide short-term breathing space to enable countries to work their way out of payments deficits and thus avoid unwarranted devaluations, which would threaten the system of relatively stable exchange parities.' 52

Hence, when applied to a country with the economic characteristics of post-revolutionary Portugal, it is not surprising that there may have been (to be as charitable as possible) unintended results (such as a dramatic fall in real wages and licensed incentive for political leaders to forge a policy that will limit the public sector<sup>53</sup>).

'Stabilization' has effectively been much more than stabilization

in its more neutral sense of restoring balance to, of contributing to the firmness of, the Portuguese economy. Rather, it appears to have been more a process of fixing the economy within the established parameters of international and national capitalism.<sup>54</sup> At the time of the IMF intervention there were fears that such 'stabilization' might put at risk Portugal's 'new' democratic institutions.<sup>55</sup> The brutally instrumental nature of the IMF's intervention made it appear as though the IMF might be willing to risk Portuguese democracy in order to save Portuguese capitalism (or to save Portugal for capitalism).<sup>56</sup> Here, indeed, there is a distinction to be made between the role of IMF intervention in the latter half of the decade of the seventies, and the role of international organizations, and foreign investment generally, in the 1950s and 60s, and, as we shall see further on, World Bank involvement in Portuguese education, also in the late seventies. During the 1950s and 60s, foreign investment and 'OECDism', with its human capital preoccupations, were allies in their objective of strengthening capitalist social relations in Portugal. In his impressive study of foreign investment in Portugal,<sup>57</sup> Salgado de Matos wrote:

'We are importing "private initiative", the capacity to articulate factors of production and sales - and not capitals, nor techniques. These also enter, naturally, in large or unknown quantities; but what essentially arrives from abroad is the number one virtue of the capitalist system, that on which it shall be judged: individual or company "private initiative". We do not import capital: we import capitalism to strengthen that already existing.' 58

The importation of private initiative in the 1960s was important because of the very specific nature of Portuguese 'dependence'.

Matos, writing in the early 1970s on the situation in the late 1950s and in the 1960s, and J.M. Rolo, writing in the middle 1970s on the present situation,<sup>59</sup> have both been adamant in their opinion that the Portuguese economy neither was, nor is, dominated by foreign capital (although Rolo<sup>60</sup> has recently drawn attention to the increasing 'subalternization' of the state enterprise sector in Portugal and the increasingly favourable conditions for foreign capital investment, two factors which he argues could lead to a situation where foreign capital did, in fact, control the process of accumulation).<sup>61</sup> Both authors have argued that the implantation of multinational enterprises has occurred principally in some areas of the modern sector, but not in key economic sectors (similar to that which has occurred in the European countries of Ireland and Greece, but unlike Chile and Brazil, where basic extraction industries have been under foreign control). Rolo argues this has been due to three major factors: 1) the low level of strategic national resources in Portugal; 2) the actual degree of development of Portuguese industry; and 3) the relatively hostile attitude of the Salazarist regime to foreign investment during many years.<sup>62</sup> Other authors have confirmed this assessment by Rolo, particularly with regard to the third factor:

'Let's say it simply without fear of committing sacrilege: Portuguese capitalism, without the intervention of the Salazarist state, would be today more dependent on international foreign capital and its degree of monopolization would be even higher.' <sup>63</sup>

Further, this explains how Matos could write in 1973:

'It is probable (...) that with the Portuguese bourgeoisie the principal contradiction occurs among Portuguese economic groups and not between

Portuguese and foreign economic groups.' 64

The change in attitude towards foreign investment by the Salazarist regime in the early sixties, when it was decided that some foreign investment would be advantageous, although prepared by the external conjuncture (by such factors as the general mood of economic integration in Europe, the conditions imposed for receiving Marshall aid, the fact that Portugal was a founding member of the OEEC, etc.), was determined, according to Matos, by internal events (the prime event being the beginning of the colonial wars in 1961).<sup>65</sup> Thus, the increase in public spending caused by the colonial wars was compensated for by resort to foreign capital which allowed:

- 1) a defence of Portuguese capital in the important economic groups,
- 2) development to continue despite increased public spending, and
- 3) the creation of jobs, thus restoring the confidence of Portuguese capitalists.<sup>66</sup>

The resort to foreign capital in turn put great pressure on Portugal to subscribe and ratify 1) the World Bank convention on the resolution of conflicts between states and nationals of other states, 2) the World Bank convention project for the guarantee of multinational investments, and 3) the OECD convention project for the protection of private property. The fears of the World Bank and the OECD were not without foundation, wrote Matos in the early seventies,

'(...) for if Portuguese guarantees are conjunctureally strong - for political reasons and due to abundant Portuguese foreign reserves - almost all of them depend on internal laws, which can be unilaterally revoked by Portuguese legislators.' 67

Portugal's 'relative independence' from international capital, plus the relatively high state of development of its industry, and the importance of the colonies to the country, in terms of trade

(especially prior to the 1960s), in terms of the national identity of the Portuguese, and (later) in terms of the effects of the colonial wars, led Matos to situate Portugal internationally as a nation with 'one foot in the centre, the other in the periphery'.<sup>68</sup> M. Murteira, however, has argued in a relatively recent work, that in spite of what he terms Salazar's 'economic nationalism' and the fact that

'(...) the internationalization of capital, in the molds which have characterized the capitalist process during the last quarter century, did not penetrate Portugal (as opposed to Spain, for example)', 69

the country finds itself more appropriately situated in the latter category:

'It is known that the Portuguese social formation never managed to structure itself in terms of introducing itself into a dynamic of growth based on the surpluses created through colonial exploitation. The Portuguese Empire was always a subempire, in the sense that it exercised an exploitation or domination of a second order, in that the real metropolises used Portugal as an intermediary in a process of transference of wealth. This intermediate position was, really, more peripheral than centre-like, although we can speculate forever over the exact classification of a social formation so intimately linked to a hybrid reality of exploiter/exploited or dominator/dominated typical of the secular process of Portuguese development.' 70

The 'relative independence' of the Salazarist era (portrayed through the 'hostile attitude of the Salazarist regime') and the 'national independence' of the revolutionary period (in Vasco Gonçalves' words, the 'profound transformation of the socio-economic structure' (...)); 'the opening and developing of relations

between Portugal and the socialist countries and the countries of the Third World'; 'the decolonization process') contrast greatly with the policy of external investment loans initiated by (forced upon?) the democratically-elected 1st Constitutional Government. However, it should be noted that the loans were negotiated with those countries and organizations considered vital to the strengthening of democratic institutions in Portugal, and thus were themselves part of a strategy of national independence;<sup>71</sup>

'At a time when Portugal is engaged in a profound crisis of identity provoked by five hundred years of colonial frustrations and long periods of political obscurantism, the integration of the country into the European Community as a full member is much more than a path leading to economic growth. It is a venture capable of uniting the democratic forces in the task of preparing a future which will be freer and more prosperous for all Portuguese.' 72

Nevertheless, without the 'protection' of the 'hostile attitude of the Salazarist regime' and with a socio-economic structure still vibrating from the 'profound transformation' it had undergone, there existed a danger that 'normalization' might evolve into a species of 'peripheralization' - meaning that 1) decision-making centres increasingly lay outside national boundaries,<sup>73</sup> and 2) that the reinforcement of capitalism in the Portuguese context specifically in relation to education worked against the egalitarian-participatory project in education that was initiated with the Veiga Simão Reform and propelled forward by the revolution.

It is here that we find a crucial difference regarding the effects that the intervention of international organizations have had in Portuguese education. The advice and expertise offered by the OECD in the 1960s and early 1970s, although it may have

indirectly strengthened capitalist social relations in Portugal - through, for example, the imposition of planning techniques, of a model for growth based on the notion of human capital, and of a general attitude of preoccupation with economic growth (none of which are by any means 'capitalist' in themselves), and by helping produce a new integrating social role for education -, was put to work in a political and economic climate strongly governed by a national policy designed and executed at state level. Can the same be said for the aid, advice and expertise offered by the World Bank in the late 1970s? The question is, in fact, difficult to answer, for although the political and economic climate of the late 1970s (early 1980s) may not be favourable to national independence,<sup>74</sup> and although the hostile attitude of the Salazarist regime to foreign investment over many years may no longer be an important factor, it has to be remembered that, in addition to structural changes in the economy, with the revolution Portuguese civil society found itself 'liberated', in the sense that the role of both the Church and the family, which hitherto had 'had the effect of emptying civil society of any political content',<sup>75</sup> was severely reduced. Thus, we find questions concerning Portuguese national independence hotly debated in associations, trade unions, political parties, the press, not to mention the Portuguese parliament (the Assembly of the Republic). The gradual reimposition of the state since the revolutionary period, however, which appears to have resulted, on the one hand, in an ever greater invasion of civil society by technical and administrative rationality (the aim of crisis management),<sup>76</sup> and, on the other hand, in what have been clumsy attempts to restore the role of the Church and family in

civil society<sup>77</sup> (though civil society still retains a degree of differentiation and vivacity far beyond that which existed under the Estado Novo or the Estado Social<sup>78</sup>), may be seen as an increasingly important threat to the implantation of a participatory and democratic education system.

In what follows we would like to look in some detail at World Bank involvement in the Polytechnic Higher Education project in Portugal.<sup>79</sup> In the course of our analysis we would like to see just what the World Bank has contributed to the normalization process, to see to what extent that contribution has been more ideological than instrumental, and, finally, to consider the effects of such intervention on Portuguese national independence.

#### The World Bank and the Restructuring of Higher Education

Decree-Law no. 427-B/77 of the 14th of October, 1977, set out the need for, and the scope of, an intermediate sector of higher education in Portugal. The Decree-Law stated that with the transformation of what was prior to the revolution of 25 April, 1974, intermediate higher education ('ensino médio') into university-level higher education ('ensino superior'), there appeared a gap in the education system.<sup>80</sup> That gap, i.e. the formation of middle-level technicians, required by socio-economic activities, had to be filled.

Further, it was argued that the act of creating university-type establishments after the 25th of April, 1974, while raising the number of persons holding a diploma proving a certain theoretical formation of university type, did nothing to establish a correspondence between the number of diplomas proffered and the

'real needs of the country',<sup>81</sup> such that an evident disequilibrium occurred which could come to have serious social and economic consequences.

To fill the gap, then, the creation of schools of higher education of 'an essentially practical nature', aimed at producing qualified technicians at an intermediate higher level, with a corresponding status and professional dignity, was considered urgent. Such schools, it was claimed, would allow for the hierarchization of personal values of production not only by way of an academic title, but by way of 'real productive capacity'.

Thus, Decree-Law no. 427-B/77 decreed the establishment of a higher education sector of short-term duration ('Ensino Superior de Curta Duração'), now known in Portugal as Polytechnic Education, or better, Polytechnic Higher Education ('Ensino Superior Politécnico').<sup>82</sup> This sector, it was claimed, would permit not only the diversification of higher education, but also satisfy pressing needs in various socio-economic sectors by forming qualified technicians in activities where there was manifested a lack or even the non-existence of such qualified personnel. In an initial phase, therefore, the satisfaction of the following was foreseen: of needs in the technology of food products, in agriculture, livestock and forestry production, in industrial technology, in health and services (secretaries, tourism, administration and accountancy), in addition to the formation of nursery school teachers and teachers of primary school. It was considered that in a second phase other needs or shortages would be seen to. It was suggested that, in addition to being economically and socially 'correct', the polytechnic programme would make it possible, through a new type of diploma and a type of specialized and professional practical

training, to produce a work force with a high probability of acceptability on the labour market, whether in the public sector, or in the private.<sup>83</sup>

The actual programme of Polytechnic Higher Education would be, according to the Law, administered regionally in Technical Higher Education establishments and in Schools of Higher Education.

On the 28th of July, 1978, Law 61/78 was published, introducing a series of amendments to the aforementioned DL 427-B/77. The amendments resulted from criticisms (emerging from all quarters) made of DL 427-B/77.<sup>84</sup> The amendments introduced included a re-writing of Article 1, so that 'intermediate higher education' would, in fact, no longer be simply 'intermediate'. Instead, Technical Higher Education establishments would train technicians and educational professionals at a 'higher level' ('nivel superior'). Secondly, both Technical Higher Education and Teacher Higher Education establishments would take on a research capacity ('developing scientific and technological research') that would make their activities similar to the activities of the University (an additional amendment promising to secure the link between these establishments and the universities was also introduced). Finally, an amendment was added guaranteeing positive discrimination in favour of access of 'workers' to the Technical Higher Education and Teacher Higher Education establishments.

At the beginning of May, 1978, the World Bank announced publicly its approval of a loan of 21 million dollars for a 47.9 million-dollar educational development project in Portugal. It announced that the project would be directed at the improvement

and expansion of management training, the initiation of training programmes for technicians, and the introduction of vocational training in basic skills for early school-leavers, as well as introducing programmes to upgrade teacher training and school curricula. In short, the Bank announced its involvement in the Polytechnic Higher Education project in Portugal by offering credit for 15 years at an interest rate of 7.5 percent.

The World Bank's plans, outlined in Staff Appraisal Report no. 1807-PO, centred on what the Bank saw as the need for 'increasing the productivity of the existing labour force and preparing better those entering the labour market.<sup>85</sup> The Bank further suggested the re-training of unemployed and returning immigrants to provide a stock of manpower trained in new skills which would be required as the Portuguese economy changed and as Portugal prepared to enter the Common Market. In addition, there was the need to replace the loss of experienced managers through emigration by training managerial personnel. Thus, the Bank suggested that in Portugal there was a clear need for the training of middle and higher level technicians: for example, it stated that there were needed annually 1,400 post-secondary school individual technicians, 500 agricultural technicians, and 6,000 middle management personnel.

To meet general overall objectives, the Bank's educational development strategy for Portugal during the period 1977-80 was as follows: to improve the internal efficiency and quality of schooling, to improve the quality and professional competence of the entire teaching force, to adjust education and training provision to meet manpower needs, to extend the range of compulsory schooling to 6 years and to extend secondary schooling from 'grade' 11 to 'grade' 12, to assure increased access for all children, to

accelerate and improve planning activities, and to strengthen management capabilities. A second-order range of objectives would include: improving and expanding the adult literacy programme, reviewing ~~TELE~~-ESCOLA and media for school in general, reorganizing and expanding curriculum development activities within the system, establishing restricted entrance provision for post-secondary institutions, improving physical facilities in universities, especially in the sciences, and giving increased attention to cultural, social and physical education activities associated with the schools.

The Bank, in fact, suggested that more emphasis should be put on the training of adults who lacked formal schooling, however, it stated:

'(...) more detailed programmes need to be developed including estimates of cost and human resource requirements, before an adequate assessment of the feasibility of the above proposals can be made.' 86

As far as pre-school or pre-primary teacher training was concerned, the Bank explicitly stated that it did not support it, for

'(...) such rapid expansion and large expenditure do not appear to be warranted in view of other areas in the education and training sector which could provide more immediate returns on investment of this magnitude.' 87

Rather the Government, it was argued, should be encouraged to invest scarce resources in higher priority fields of adult training.

Finally, the World Bank summarized its principal objectives in participating in the Polytechnic Higher Education project in Portugal:

'(...) 1) to introduce the concept of sub-professional practically-trained and oriented technician training to provide

the type of trained personnel required by a) rapidly developing industrial complexes throughout the country, b) the renewed emphasis upon improvement of the food processing and food production sub-sectors, and c) middle level management for the rapidly modernizing commerce-industry-service sectors; 2) to provide unemployed early school leavers in major urban areas with the opportunity to acquire pre-apprentice skills training; 3) to improve the upgrading and improving of teacher training facilities with emphasis on a) developing a programme for training teachers of handicapped children, b) introducing concurrent teachers' education programmes within a new university with emphasis on the training of preparatory and secondary teachers, c) providing facilities for full-time and ad hoc courses in in-service training for teachers at all levels, and d) replacing existing primary teacher training institutes with fewer, new and appropriately equipped regional teacher training institutions for primary and preparatory (basic cycle) teachers; 4) to improve the quality and scope of management training.' 88

### The Timing and the Context of World Bank Intervention

Involvement of the World Bank in Portuguese education took place at one point in time rather than at another. Recognition of this fact may contribute to our understanding of precisely why countries apply for and accept World Bank aid and expertise. Paul Hirst states the obvious when he suggests that countries accept the Bank's aid for two basic reasons: 1) the Bank supplies 'money that can be invested in most urgently needed and useful activities' (acting therefore as a catalyst), and 2) the Bank supplies 'sorely needed foreign exchange for buildings and equipment, foreign know-how (teaching methods, curriculum design), and technical assistance.'<sup>89</sup> Now these two immediately obvious

reasons (manifest) may be determined by, or, at a minimum, be related to, others that are more conjunctural (latent). For a start, we have seen in our present study that there is a lack of fit between a situation of educational mobilization and an approach to development largely based on manpower planning. A situation of educational mobilization might be taken then as an explanation for the absence of World Bank involvement.<sup>90</sup> Secondly, and relatedly, normalization in the Portuguese context has required, as we saw above through the example of the IMF, external support in order to guarantee the 'credit worthiness' of the Portuguese economy. Here, the World Bank may have played a similar, albeit less direct and more subtle, role.

As far as the field of education is concerned,<sup>91</sup> World Bank involvement may also have played a role in providing external support for an Education Ministry badly in need of a new image after the loss of authority suffered during the revolutionary period. Indeed, flimsy authority structures and conflicting political ideologies within the Ministry may well have created a need for an external agency able to help impose planning procedures in at least one sector of the education system (this indeed may have been welcomed even by those sectors normally ideologically hostile to intervention by international organizations). Finally, the whole normalization process could not have been very well articulated by the same notion of national identity that nourished Salazar's Portugal (the Empire and 'relative independence'), or that was to have formed the basis for a revolutionary socialist Portugal (decolonization and the development of relations between Portugal and the socialist and Third World countries). Rather, as we have

seen, normalization has been presented to the public as a strengthening of Portugal's European cultural heritage, as a strategy for strengthening Portugal's link to the 'free' and democratic nations of the West. Hence, World Bank aid and expertise, seen in this light, may well have been further proof of Portugal's new orientation (European and pluralist, party-based democracy). Of course, the problem has been that to put this new orientation into effect, something has had to be excluded - and that something, as we already know from previous chapters has been socialism, or 'socialist education'. In what follows we shall take a closer look at this process.

In both the reports written by the World Bank on Portugal, instrumental to the Polytechnic Higher Education project (the 1977 and the 1978 reports), we find a considerable gulf between the preoccupations of the Bank as regards education in Portugal and the actual debate on education going on within Portuguese society.<sup>92</sup> However, at the same time we find continuity between the Bank's preoccupations and the state/pluralist political-party oriented process of normalization. While within the Ministry of Education, efficiency (articulating economic viability) and hierarchy (articulating the 'end of anarchy') have become concepts once again in vogue, within civil society generally the conquests of the revolution have continued to be the subject of, at times, heated debate. In fact, debate over, and implementation of, the conquests of the revolution, particularly in the case of education, have been increasingly restricted to civil society as the state has gradually 'cleansed', or neutralized, the official education

system to the extent that even conquests that were imposed on the state, such as the democratic management of schools, are now seen to be threatened by it.<sup>93</sup>

What have the Bank's major preoccupations been? In both reports the Bank makes clear that in its eyes what is mainly at stake is a 'viable education system'. Unfortunately, and in spite of what the Bank proclaimed were its new concerns in its 1974 Sector Paper,<sup>94</sup> this appears to mean that education's contribution to national development is almost entirely economic. How else is one to interpret the constant emphasis in the Bank's reports, interspersed with token acknowledgement of the changes brought about by the revolution, on meeting the demands of the labour market? Thus, in the 1978 report we are told:

'Portugal is going through a period of profound social and economic change (...). However (sic), there is a need for increasing productivity of the existing labour forces and preparing better those entering the labour market.' 95

As for the earlier 1977 report, it is really nothing more than a call for manpower planning studies and an argument against mobilization activities. After paying lip service to the important changes that took place, the Bank states (in Paragraph 157):

'(...) some important decisions have been made and programs initiated during the revolutionary period without adequate study of the demands these would make on resources.' 96

And further on, in Paragraph 166 of the same report, under the heading of 'Major Issues: the problem of "Quality vs. Quantity"', we find the following:

'If resources are found to be limited for simultaneous action on a broad front of both qualitative and quantitative programs, a fundamental decision will have to be taken

on whether priority should be given to a quantitative expansion or whether the major effort should be made to raise the quality of the system.' 97

In principle that may sound fair enough,<sup>98</sup> but what is meant by 'raising the quality of the system'? What yardstick is to be applied for measuring needs in the formulation of educational policy? Criteria concerning the efficient administration of the education system? Or the Constitution of the Portuguese Republic? Paragraph 167 of the 1977 report harps on the need for manpower studies and for studies of funds available, and paragraph 168 stunningly concludes:

'A number of programs require further planning studies if specific investment projects are to be defined, particularly those relating to: i) the appropriate structure of the education system in the context of Portuguese realities (sic); ii) proposals for some form of vocational training for the basic-school leavers and for secondary-school graduates not going on to higher education; iii) assessment of the need for further training and upgrading apart from the provisions for agricultural education in the formal system; iv) revised curricula for the new secondary schools; v) preparation of a teacher education plan, including the demand for teacher training; vi) measures to ensure the most rational use and deployment of physical and teacher resources; and vii) measures necessary to popularize and expand technician or sub-professional training.' 99

In fact, all problems in both reports are taken to be essentially technical problems which can be solved by planning studies. At least to this extent the Bank is coherent in the timing of its participation, for the resolution of educational problems at a time of normalization requires, indeed, the political neutralization of those problems. Often, this is accomplished through reformulating those problems in technical terms. Thus, it is the exclusiveness of the technical-function theory underlying the World Bank's

concerns in Portugal, and the consequent neglect (or rather sweeping under the carpet) of all burning issues, rather than the actual subject matter of the Bank's concerns, that appears so abrasive in the post-revolutionary epoch. Thus, instead of narrowing the gap between the Portuguese education system and 'Portuguese realities', the Bank's concerns, and the Portuguese Government's response, may have actually widened it.

There is an implicit link between educational achievement and occupational position (or, in other words, an assumption that educational credentials are vocationally relevant) in the proposals of the Portuguese Government's DL 427-B/77 and the World Bank's report 1807 that may lead the unwary to believe that social stratification is a result of productivity, which supposedly results from the expertness and knowledge acquired through education. Thus, more education equals more productivity, and more productivity equals a better social position. The falseness of this argument has been more than amply demonstrated over the past decade.<sup>100</sup> Instead, it has been argued that education provides credentials, not qualifications (which does not mean that one denies the fact that 'in a quite significant minority (of cases) (credentials) are of greatest importance to occupation'<sup>101</sup>). Counting on education to contribute to economic development through its so-called capacity to fulfil the manpower needs of the labour market is a risky business. Furthermore, manpower planning is invariably a project of 'anti-mobilization' (in the terms that we set out for mobilization above: i.e. the maximum utilization of a country's cultural and social resources to provide maximum educational expansion as part of a project that includes achieving social, and eventually economic, egalitarianism), for it

'(...) is often necessarily set against mass participation in education; it involves the allocation of resources unequally and primarily to the "elite" sectors of the system - colleges, universities, overseas scholarships, etc.; it places an onus on selection and sponsorship, which inevitably reinforces tribal, social-class and regional disparities existing within the system.' 102

Consequently,

'Each stage of education quite clearly becomes a preparation for the stage that follows; the onus is upon examination work and not upon the provision of a satisfactory or relevant terminal education for those pupils - the majority - who are to be "cooled out" of the system.' 103

The opposite side of the coin is the sort of education and cultural mobilization (not only spontaneous, but also centrally directed) that we examined above in Chapters 3 and 4. It takes an almost overwhelming commitment by a country to incorporate 'the masses' into the social and economic development necessary to achieve and consolidate basic changes in social relations which lead to greater equality. 104

The World Bank report of June, 1977, preceded Socialist Party Education Sottomayor Cardia's DL 427-B/77 by only four months. The Ministry's 'Plan for the Rationalization of Primary and Preparatory Teacher Training in Portugal' appeared a few months later, followed, again a few months later, by World Bank report no. 1807. The effect of these documents was to reduce practically all official debate on educational change not only to the language of educational planning but also to the higher education sector, for the Polytechnic Higher Education project has been the project that has symbolized, more than any other,

post-revolutionary educational reform. This, of course, was in huge contrast to the revolutionary period where Ministerial action was focussed above all on pre-primary and primary schooling, on the comprehensivisation of secondary schooling, on mobilization activities and on various forms of life-long education. To this extent, and in answer to one of the questions posed at the beginning of the chapter, there does appear to be a certain degree of incompatibility between the consolidation of a democratic/participative rationale in education and the intervention of the World Bank in Portuguese education, although the latter does not necessarily preclude the former. We say this because the consolidation of a democratic/participatory rationale does appear to require a degree of mobilization not permitted by the Bank's schema. Does this mean, then, that Ramalho's 'project for the school' is, as he implied, condemned to being merely a support for capitalism's 'prolonged economic crisis'?

#### A Project for the School (?)

Aklilu Habte (Head of the World Bank Education Division), reflecting on the World Bank report of 1980 on education,<sup>105</sup> makes it clear that the World Bank decides what educational priorities are in recipient countries in joint discussions with representatives of those countries. The Bank then supplies the money and the expertise ('mainly technical and economic planning') necessary to turn priorities into 'action programmes'. Our discussion so far has shown that in Portugal there has been a close correspondence between the Bank's educational and economic concerns, expressed in its reports, and the educational and economic concerns of the

Portuguese Ministry of Education, expressed in the project of Polytechnic Higher Education.<sup>106</sup> Vital questions such as which sectors to invest in, which educational problems are deemed most important, even how to conceive educational problems, have been discussed and decided upon in the context of a wider governmental policy based on attracting external investment and loans.<sup>107</sup> Two possible (and likely) consequences follow: 1) the solving of educational problems is not only being influenced by decision-making centres beyond national frontiers, but those centres are setting the parameters for possible solutions, and, in turn, 2) the end of (and exclusion of) mobilization activities. In short, what was looked upon as 'socialist education' - i.e. mobilization and its commitment to incorporate 'the masses' in a context of internally controlled economic and social development -, when what counted above all was education's transformative role, has been excluded. Education, which under the Veiga Simão Reform and the revolution, worked primarily to democratize Portugal, under the Polytechnic Higher Education project, and World Bank involvement, works primarily to prepare Portugal for entry into the EEC.<sup>108</sup> While the two are not mutually exclusive, one must ask, in the context of 'Portuguese realities', where the subject of debate favoured by the state - i.e. joining the EEC - has effectively diverted attention away from the educational problems being debated in civil society,<sup>109</sup> what price will have to be paid for the strengthening of capitalist social relations (in Matos's sense of strengthening those already existing) through the interpretation of educational problems via technical-function theory and educational planning?<sup>110</sup>

In fact, education's transformative role has found some space for expression, even at the level of the Polytechnic Higher Education project. World Bank intervention in the creation of new institutions for teacher training (the Escolas Superiores da Educação), after an initially active role at the stage of conception of the institutions,<sup>111</sup> has been rather limited (mainly confined to control on spending and directives on purchase of equipment<sup>112</sup>). A major preoccupation of the team responsible for the project at the level of curriculum planning and design of the courses was precisely the 'democratization of teacher training',<sup>113</sup> and in this respect its work showed sensitivity to the 'conquests of the revolution' in terms of 1) pedagogic technique, and 2) the need to implant, as far as possible, the new colleges of education in their local settings.<sup>114</sup> Also, above, we made reference to a series of amendments made to DL 427-B/77 in the form of Law 61/78 of the 28th of July, 1978. All the amendments, provoked by public and political party protest, aimed at counter-balancing the overly economic orientation of DL 427-B/77, while at the same time reinforcing its egalitarian/participative aspects.<sup>115</sup> Thus 'Portuguese realities' did manage to impose a certain national identity on the project.

As we have seen, the Decree-Law setting up Polytechnic Higher Education made reference to the creation of schools of higher education of 'an essentially practical nature', able to take into account 'Portuguese realities' (i.e. 'the real needs of the country'). Although these phrases may seem a bit pat, they are not harmless. Apart from any implications they may have for a predominantly labour market-oriented approach, they also echo concerns derived directly from the revolutionary period and from

Portugal's past. António Sérgio, an outstanding 20th century Portuguese philosopher and pedagogue, proclaimed (already in the 1920s) 'the urgency of a concrete pedagogy of national salvation, deduced from Portuguese history, from Portuguese needs'.<sup>116</sup> Sérgio's principal concern was with what he saw as the incapacity of Portugal's 'elite' to produce either sustained economic development or social justice.<sup>117</sup> Sérgio's answer to the problem was expressed, perhaps most eloquently, in his plan for a network of experimental schools which he attempted to set up when briefly Minister of Public Instruction in 1923.<sup>118</sup> The schools were designated 'self-ruled communities in productive cooperative work'; their aim: 'to stimulate the growth of the autonomy of the pupil'.<sup>119</sup> Their major innovation was that they conceived the introduction of productive work into the school. The three basic ideas behind the schools according to Grácio (paraphrasing Sérgio) were:

- 1) '(...) to make men capable of "perfecting society"' - 'giving men a sense of civic duty (and professional ethics)' - 'a school of work would be equally a school of character formation'; 2) to produce 'a school of work, essentially active, open to rich and poor (...) which would ban "pedagogic dualism which divides classes from the start; at the bottom, simple instruction of the ABCs, mechanistic and utilitarian, for the man of the people; at the top, this ethereal education, falsely aristocratic, merely speculative and without a link to work, which produces, even today (sic), the ruling classes of society"'; 3) to produce 'an active school, a school of cooperative work', 'which can stimulate economic development and social democracy, the necessary bases of collective morality (...) to overcome the economic inferiority of the Portuguese, whose oligarchic system creates beggars and parasites.' 120

During the mobilization of particularly pre-primary and

primary education after the 25th of April 1974, António Sérgio's words and ideas reappeared as a properly Portuguese conception of the path to the profound democratization of the education system. Though commentators were quick to point out his 'limitations' - '(...) basically, Sérgio never went beyond the plan of English-type social democracy (...)'<sup>121</sup> -, his work was considered essential. The answer to this apparent contradiction lay in the use to which his ideas could be put in a situation of 'revolutionary mobilization'. Thus, his pedagogy was separated from his sociology. Derived from the role he conceived for 'productive cooperative work' in the school,<sup>122</sup> it was the 'practical nature' of his conception of schooling that appealed most at a time when 'action was needed (and not words)'.<sup>123</sup>

'Sérgio understood that a good teacher is not one who limits him/herself to a knowledge of good doctrines, but rather one who is capable of putting them into practice.' 124

Additionally, there was his insistence on the transformative role of the teacher, which perfectly suited mobilization and the notion of the teacher as a cultural agent. Finally, Sérgio's emphasis on pedagogic technique provided just the implement required for 'the reconstruction of a nation that fascism had left devastated.'<sup>125</sup>

Sérgio's example shows more than anything else, that a concern with a practical form of training that takes into account 'Portuguese realities' had been on the agenda (though admittedly for most of fifty years in a submerged position) in Portugal for a long time (and was not therefore a discovery of the World Bank, or the Ministry of Education and Scientific Investigation of the 1st Constitutional Government, as one might suppose after reading the Bank's claim 'to introduce the concept of sub-professional practically-trained

and oriented technical training into Portuguese education'<sup>126</sup>). The problem was in Sérgio's time and is now how to put a 'practical form of training' into practice which at the same time recognizes and democratizes 'Portuguese realities'. Sérgio's resuscitation, employed in the context of mobilization that was the April revolution was aimed at solving this problem. The programmes developed and put into action as mobilization activities were elements of a possible 'project for the school' also sensitive to this problem. The premature demise of some of these elements and the restriction or reinterpretation of others with the onset of 'normalization' have effectively restored Sérgio (temporarily?) to his place in history.

#### Conclusion

We began this chapter by referring to the possible revival of a technocratically-oriented external dynamic in Portuguese education. We used the term 'revival' for we wished to draw attention to a possible parallel between the situation in particularly the 1960s and the situation starting in 1977 with the Higher Polytechnic Education project and World Bank intervention. In both periods Portuguese education was influenced by the intervention of international organizations: in the 1960s and early 1970s the OECD supplied advice, expertise and a model for development based on the then very much in vogue notion of 'human capital',<sup>127</sup> and, as we have seen in this chapter, the last years of the decade of the seventies brought the financial support, in the form of a loan, the advice and expertise of the World Bank.

We went on to specify the difference between the two periods

of intervention. We found that while OECD intervention in the 1960s and early 1970s may have strengthened capitalist social relations in Portugal, it took place in a political and economic climate strongly governed by a national policy designed and executed at state level. This was a policy hostile, at least in terms of its rhetoric, to 'excessive' foreign intervention in Portuguese affairs. World Bank intervention, on the other hand, initiated in the late 1970s after a period of far-reaching social, political and economic change, took place in a political and economic climate less propitious to the 'protection' of the newly-defined concerns of national independence (as laid out by the Constitution of the Republic).

We have argued that the intervention of the World Bank in Portuguese education was more ideological than instrumental. This meant that what counted above all was the support given by the institution to the redefinition and reestablishment of the state (that is, its contribution to the normalization process). In concrete terms, this included not only supplying a model for educational development based on technical-function theory but also providing external support for a state in dire need of refurbishing its image to make peace with the international capitalist community. In the process of contributing to Portugal's 'credit-worthiness', the World Bank also contributed to the rupture instigated by the normalization process with 'Portugal in transition to socialism'.

At the beginning of his proposed 'Law for Creating the Foundations of the Education System', former Education Minister Vítor Crespo wrote the following:

'The successive alterations introduced, derived from imperfectly articulated general objectives, have made impossible the

existence of any sort of coherence in the educational system and have systematically blocked the solving of problems. It is not surprising, therefore, that one has frequently sought recourse, at times abusively, to the regime of pedagogical experimentation instituted by DL 47 587 of 17 March 1967, and as a result of which, one may say, without any exaggeration, that the education "system" is, as far as primary and secondary education are concerned, a gigantic pedagogical experiment.' 128

These words, coming from an 'unsuccessful' educational minister,<sup>129</sup> six years after the April revolution, are, to say the least, significant. In a world where outside influences tend to impose their own models, or, at a minimum, only give support to those internal models which suit them, constructing a model of educational development in tune with national realities is indeed a difficult task. Back in the 1960s, Mário Murteira warned that a technocratic approach to educational development in Portugal, although potentially a vital part of any development programme, would only be constructive if encased within a societal project of social progress.<sup>130</sup> The April revolution brought a societal project of social progress. The normalization process following the revolutionary period brought a technocratic approach to education. But it shelved, or at least attempted to shelve, the societal project. World Bank intervention provided, and may continue to provide (through its orientations, through its role as 'project catalyst') missing 'coherence' within the education system. But can it provide a 'project for the school'? The logic of the normalization process would seem to indicate a reply in the negative for, in addition to reducing spending on education<sup>131</sup> and severely reducing the transformative role of education, it has also weakened the egalitarian/participatory claims made for education by the Veiga Simão Reform and the revolution. Consequently,

fears have arisen over the capacity of the Portuguese to resist the onslaught of increasing foreign economic intervention. Veiga Simão, himself, expressed this sentiment in an interview given in April 1979.<sup>132</sup> His major concern, he stated, was that in a world of increasing socio-economic interdependence, a minimum of national independence would be necessary to save Portugal from becoming a 'colony'. His concluding remark, retrieved from one of his famous 'slogans' of the early 1970s, was, ironically enough, 'national survival depends on education!'.<sup>133</sup>

Footnotes to Chapter 5

1. Ramalho, at a round-table discussion on education, in Raiz e Utopia, nos. 9-10, Spring/Summer, 1979, p. 53.
2. This topic, to make any sense, must consider Portugal's own relationship to other countries and the effects of the dealings of international organizations with Portugal. Both these points are discussed below. Portuguese authors José António Saraiva and Jorge Vicente Silva have argued: 'Portuguese reality is today more decisively conditioned by the exterior than by that which goes on within the country. External influence substitutes for, as it were, the weight that a social movement is still unable to provide in Portugal. The weakness of the parties, the very weakness of organic movements in Portuguese society, is compensated for by the foreign powers which guarantee it.' Now while it is true that 'Portuguese reality' is heavily conditioned by the 'exterior', it is also true that the 'exterior' is 'conditioned', as we saw in Chapter 1, by Portuguese conceptions of national development. This topic is also discussed in more detail below. see José António Saraiva and Jorge Vicente Silva (1977), O 25 de Abril Visto da História, Amadora: Livraria Bertrand, p. 136.
3. Even (sic) Roberto Carneiro, former Secretary of State for Education and member of Portugal's Christian-Democratic Party equivalent, the CDS, has recognized, in his own words, 'the irreversible drive in Portugal towards a more effective participation in education by citizens, institutions and interested groups, as part of a new democratic framework and of a move in the direction of overall decentralization.' see Roberto Carneiro (1979), "Planning Educational Reform", UNESCO, Educational Reforms: experiences and prospects, Paris, p. 67.
4. Although reference is made to several international organizations and the results of their dealings with Portugal, the World Bank's direct participation in the education system receives most attention.

5. For example, see the Diagnóstico da Situação (1977), M.E.I.C., Gabinete de Estudos e Planeamento (G.E.P.), p. 5.
6. *ibid.*
7. see Rodney Morrison (1981), Portugal: Revolutionary Change in an Open Economy, Boston: Auburn House Publishing Co., p. 161.
8. Diagnóstico da Situação (1977), *op. cit.*
9. *ibid.*, p. 3.
10. *ibid.*
11. And, thus, have worked against 'normalization'. (That is, they were never raised at the level of the Ministry of Education and Scientific Investigation.)
12. see J. Martins Pereira (1979), "Banco Mundial: um banco contra o desenvolvimento?", in O Expresso, September 5.
13. The World Bank is the largest single donor to education (10% of all the Bank's sector aid in 1975), but only 6 to 7% of all World Bank funds are spent on education. see Paul Hirst (1981), "Aid and Educational Development: rhetoric and reality", in Comparative Education, vol. 17, no. 2, June.
14. see A.S. Abraham (1976), "Aid to Education: to change in order to preserve", Prospects, vol. VI, no. 2.
15. Paul Hirst, *op. cit.*, p. 120.
16. see Noel McGinn, Ernesto Schiefelbein and Donald P. Warwick (1979), "Educational Planning as Political Process: two case studies from Latin America", Comparative Education Review, vol. 23, no. 2, June. Henry Levin argues in a recent article that educational planning is suffering from an 'identity crisis' due to its inability so far to produce the goods (i.e. 'development').

Interestingly, he argues further that the most 'developed' country of the world has never engaged in educational planning: 'The United States itself has never practiced educational planning, but many basic planning methods have been developed there and promoted in the Third World by the U.S. Department of State under its Agency for International Development and by such multinational organizations as UNESCO, the OAS and the World Bank.' see Henry M. Levin (1981), "The Identity Crisis of Educational Planning", Harvard Educational Review, vol. 51, no. 1.

17. see Roger Dale (1981), "Learning to be ... what? Shaping Education in Developing Countries", in Rod Aya, Hamza Alavi, and Teodor Shanin (eds.), The Sociology of Developing Societies, London: Macmillan.
18. see Roger Dale and Ann Wickham (1980), "International Organizations and National Education", paper presented to the International Sociological Association's Sociology of Education Research Group Conference, Paris.
19. The following statement from the Brandt Report makes this rather clear (at least with respect to the IMF): 'In practice, the Fund appears, often, to start from the position that all countries that need to solicit loans to remain solvent have given proof that they are incompetent or negligent in the conduct of their business affairs and that they will therefore possibly need to benefit from the guidance of a disinterested body (sic).' see Willy Brandt (1981), Norte-Sul: Assegurar a Sobrevivência, Lisbon: Moraes, Instituto de Estudos para o Desenvolvimento (I.E.D.), p. 275.
20. R. Dale and A. Wickham, *op. cit.*
21. As it is termed by Thomas La Belle and Robert Verhine (1981), "Non-formal Education and Occupational Stratification: implications for Latin America", in Education and the State: Schooling in the National Interest, vol. I, (eds.) R. Dale,

G. Esland, R. Fergusson and M. MacDonald, Falmer Press/The Open University Press.

22. Stephen Ball (1981), "The Sociology of Education in Developing Countries", The British Journal of Sociology of Education, vol. 2, no. 3, p. 305.
23. see Milagros Fernandez (1981), "The World Bank and the Third World: Reflections of a Sceptic", Prospects, vol. XI, no. 3, p. 286.
24. R. Dale, 1981, op. cit.
25. Structural economic dependence refers to the '(...) extent to which the economic structure of (developing) economies depends on foreign trade, payments, capital, technology and decision-making to generate domestic economic processes.' see Clive Thomas (1974), Dependence and Transformation, New York and London: Monthly Review Press, p. 30. see also Teresa Hayter (1971), Aid as Imperialism, Harmondsworth: Penguin Books.
26. Martin Carnoy (1981), 'Education and Development' Course E353, Unit 5, (cassette), Milton Keynes: The Open University.
27. '(...) the world economy is now such a finely oiled machine that First World interests are naturally served by it, requiring very little overt abusive management of peripheral countries as was the case in earlier stages of imperialism.' Still, occasionally, the 'machine' needs lubricating. see Alan Sica and Harland Prechel (1981), "National Political-Economic Dependency in the Global Economy and Educational Development", in Comparative Education Review, vol. 25, no. 3, October, p. 384.
28. see Ann Wickham (1981), 'Education and Development' Course E353, Unit 6, Milton Keynes: The Open University.
29. S. Ball, op. cit., p. 302.

30. Bruce Andrews (1982), "The Political Economy of World Capitalism: Theory and Practice", International Organization, 36, 1, Winter, p. 148. In Wallerstein's theory, whether Portugal, as a 'semi-peripheral' country, is 'capitalist' or 'socialist' is irrelevant; what it cannot be, without putting at risk the whole system, is 'peripheral' or 'core': '(...) the world-economy as an economy would function every bit as well without a semi-periphery. But it would be far less politically stable, for it would mean a polarized world system. The existence of the third category means precisely that the upper stratum is not faced with the unified opposition of all the others because the middle stratum is both exploited and exploiter. It follows that the specific economic role is not all that important and has thus changed through various historical stages of the modern world-system (...).' see I. Wallerstein (1981), "The Rise and Future Demise of the World Capitalist System: concepts for comparative analysis", R. Aya, H. Alavi and T. Shanin (eds.), The Sociology of Developing Societies, London: Macmillan.
31. R. Dale and A. Wickham take up this argument. see op. cit. M. Carnoy also appears to be moving in this direction. see M. Carnoy, op. cit.
32. R. Dale and A. Wickham, op. cit. see also John Taylor (1979), From Modernization to Modes of Production, London: Macmillan.
33. see Claus Offe and Volker Ronge (1975), "Notes: Theses on the Theory of the State", New German Critique, no. 6.
34. Mihaly Vjada adds, in the same line of thought: '(...) the bourgeoisie is the first ruling class in history, i.e. the first dominant stratum with regard to a specific aspect, whose power is not political, which is sometimes forced to fight the state for its own, specific possibility of domination.' M. Vjada (1978), "The State and Socialism", Social Research, vol. 45, no. 4, Winter, p. 860.
35. see Claus Offe (1972), "Political Authority and Class Structure",

in Paul Connerton (ed.), Critical Sociology, Harmondsworth: Penguin Books.

36. Each of these three problems takes on different, specific, 'national' forms in different societies. The outcome of the pressure created by the problems therefore differs from society to society. Hence the value not only of comparative studies, but also of case studies to see precisely how these processes work out differently in different societies. see R. Dale (1983), "The Political Sociology of Education", British Journal of Sociology of Education, 4,2.
37. John Fitz (1981), 'Education, Welfare and Social Order' Course E353, Unit 12, Milton Keynes: The Open University, pp. 10-11.
38. Vasco Gonçalves (1977), Discursos, Conferências de Imprensa, Entrevistas, Lisbon: Seara Nova, p. 41.
39. One 'conto' equals 1000 Portuguese escudos. There are approximately 180 Portuguese escudos to the British Pound Sterling (current exchange rates). At the time the article appeared there were approximately 35 escudos to the British Pound.
40. From the newspaper O Expresso, July 20, 1974. The newspaper O Expresso has been since its first appearance in the early seventies a weekly newspaper broadly liberal-democratic in its approach to the news. Its approximate equivalent in the U.K. is the Sunday Times.
41. O Expresso, November 1, 1974.
42. see J. Cândido de Azevedo (1978), Adesão de Portugal a C.E.E., (Secretaria de Estado da Comunicação Social), Lisbon: Editorial Império, pp. 71-75.
43. Rodney Morrison, op. cit., p. 143. see also the Bulletins of the A.I.P. (Association of Portuguese Industry) and the C.I.P. (Confederation of Portuguese Industry), 1975-76; plus J. Cândido de Azevedo, op. cit.

44. R. Morrison, op. cit., p. 128. M. Milkman also confirms that 'aid (would) be guaranteed if Portugal (were) genuinely democratic and pluralist'. Milkman bases her conclusions on articles in the Financial Times (June 19, 1975) and in the Portuguese press (e.g. Diário Popular, 25 September 1975; Jornal Novo, 7 October 1975). see Margaret Milkman (1979), "L'Articulation entre la Politique Internationale et la Politique Interne au Portugal Après le 25 Avril 1974", Licentiate Dissertation, Université Catholique de Louvain: Institute de Science Politique et Sociologie, September.
  
45. With the exception of Macau. Mozambique proclaimed its independence in June 1975; Angola on November 11, 1975; Guinea-Bissau in September 1974.
  
46. In fact, Portugal today depends on the rest of the world for approximately half its domestic food consumption. It imports all its oil, and exports count for almost a third of the country's income. see among others, in addition to R. Morrison, op. cit., works by Eric N. Baklanoff: for example, (1976), Mediterranean Europe and the Common Market: Studies of Economic Growth and Integration, Birmingham: University of Alabama Press; (1978), The Economic Transformation of Spain and Portugal, New York: Praeger.
  
47. see Norman Girvan (1980), "Swallowing the IMF Medicine in the Seventies", Development Dialogue, Uppsala, (1).
  
48. *ibid.*, p. 57.
  
49. According to the Business Environment Risk Index (BERI), organized by Professor Haner of the University of Delaware, U.S.A. Portugal fell from being a country of moderate risks for investment to 10th position among countries with the greatest risks for investment (see Wolfgang Kemper (1978), "Investimento Estrangeiro em Portugal: o ponto de vista de um investidor estrangeiro", Separata of Economia, vol. II, no. 1, January, pp. 129-31).

50. see Figure 1; Chapter 4.
51. see Girvan, op. cit. The loan met considerable domestic resistance, particularly from the Portuguese Communist Party, and was severely criticized by the press, even in industrially advanced countries. For example, the New York Times commented: 'Remedies prescribed by IMF inappropriate to Portuguese case'. And Le Monde proclaimed: 'Portugal Under the Control of the IMF.' see R. Morrison, op. cit., p. 83; p. 85. Girvan's case study of Portugal led him to describe the country as 'a peripheral northern country which received "Third World treatment" from the Fund (IMF)' (op. cit., p. 55). see also the Brandt Report's scathing remarks about the negative effects of IMF intervention generally (in Willy Brandt, op. cit., pp. 274-7).
52. see Ismail-Subri Abdalla (1980), "The Inadequacy and Loss of Legitimacy of the International Monetary Fund", Development Dialogue, Uppsala, (2), p. 38.
53. N. Girvan concludes that the result of IMF intervention in Portugal has been '(...) a drastic process of income redistribution from urban and rural workers to groups associated with foreign trade (importers and exporters) and certain sectors of the old ruling class.' see op. cit., p. 70.
54. M. Murteira, for example, sees the current phase of capitalist development in Portugal as 'a preparatory phase for the economic and political conditions adequate to the positioning of the Portuguese economy within the logic of the international division of labour.' see M. Murteira (1978), "Estruturas e Tendências do Crescimento Económico Mundial", Análise Social, 53, vol. XIV, p. 37.
55. Hence the fear and dismay expressed in the newspaper headlines reacting to the harsh conditions imposed by the IMF loan. see note 51 above.
56. Practically in opposition to the Friedmanite-like logic of the

IMF, the EEC and EFTA demonstrated a real preoccupation with the political stability of Portuguese institutions. In British Parliament government and opposition M.P.s argued that the revolutionary period had shown that 'Western interests' could only be safely guaranteed through a commitment to democracy: '(...) political and economic facts cannot be separated. The relation between the commitment to democracy and a sound economic base is extremely close. In helping the applicant countries to enjoy a share of the economic benefits of membership to the Common Market the Community will be helping stability, which will be essential soil for democracy to grow in.' see Frank Judd, The Minister of State, Foreign and Commonwealth Office, Hansard, May 2, 1978, p. 103. Thus, the narrow economic view of the IMF was condemned: 'If these IMF disciplines are too harsh and if Europe refuses to give any help unless Portugal agrees to abide by them we may put at risk the very fragile plant of democracy in that country. There was a perceptive article in the New York Herald Tribune over Easter which was widely read by the Portuguese Government, which asked how many democracies had been destroyed by the IMF.' Jeremy Thorpe, M.P. for the Liberal Party, Hansard, May 2, 1978, p. 116.

57. see Luis Salgado do Matos (1973), Investimento Estrangeiro em Portugal, Lisbon: Seara Nova.
58. *ibid.*, p. 292. One must be careful not to confuse foreign investment (largely from multinational corporations in the 1960s) with international aid/advice organizations. However, both the OECD and the World Bank strongly supported multinational investment in Portugal during the 1960s as long as certain provisos (protecting the interests of multinational investment) were met. This is discussed below.
59. L. Salgado de Matos, *ibid.* J.M. Rolo (1975), "Transferência de Tecnologia e Dependência Estrutural Portuguesa: resultados de um inquérito", Análise Social, no. 42-3.

60. see J.M. Rolo (1978), "Factores de Consolidação e Dinamização do Sector Empresarial do Estado", Análise Social, no. 55, pp. 441-2.
61. Other authors have emphasized Portugal's 'external dependence', meaning its process of industrialization based on a vast reserve of cheap labour. Thus, industry is labour intensive rather than capital intensive; salaries are low, as is internal consumption; industry is export-oriented, yet at the same time dependent on large imports of raw materials and equipment; the agriculture sector is backward; etc. see Miriam Halpern Pereira (1974), Assimetria de Crescimento e Dependência Externa, Lisbon: Seara Nova, p. 41.
62. J.M. Rolo, 1975, op. cit., p. 23.
63. António Barreto (1975), "O Capitalismo Português: o estado e o desenvolvimento", in A. Barreto and J.M. Ferreira, Polémica Socialista, Lisbon: Iniciativas Editoriais, p. 135. Marcello Caetano stated as Prime Minister in 1969, in true Salazarist tradition, that foreign capital was 'very welcome' as long as 'it comes to effectively help internal growth and not when it comes to exploit us.' see Salgado de Matos, op. cit.
64. I. Salgado de Matos, op. cit., p. 291.
65. *ibid.* see also earlier comments in Chapter 2.
66. *ibid.*
67. *ibid.*, pp. 107-8.
68. *ibid.*, p. 281.
69. M. Murteira, 1978, op. cit., p. 37.
70. *ibid.*; pp. 36-7. Murteira's preoccupation with exchange relations

and the 'positioning of the Portuguese economy within the logic of the international division of labour' contrasts with Matos' more production-oriented approach. Indeed, one finds in the Portuguese literature traces of that same 'tension between the articulation of a general theory of social change and the empirical analysis of genetically distinct social systems (which) not only haunts Marx's own writings, but is also evident throughout the transition debate.' see Robert J. Holton (1981), "Marxist Theories of Social Change and the Transition from Feudalism to Capitalism", Theory and Society, 10, p. 862.

71. Even the IMF, of course, finds its most important contributors among the Western nations. Thus, the EEC nations had a vested interest in helping '(...) the democratic Government in Portugal, whether or not that country was a candidate for membership to the Community. The Community has already since 1974 decided to extend EIB loans to Portugal worth about 275 millions. Bilaterally, we in Britain have allocated aid to Portugal worth over £5 million, as well as contributing 20 million dollars to the multilateral balance of payments facility organized by the IMF. In addition, of course, we help Portugal considerably through the World Bank.' see Frank Judd, The Minister of State, Foreign and Commonwealth Office, Hansard, May 2, 1978, p. 105. With regard to a strategy of national independence on the part of the Socialist Party, M. Milkman suggests it was based, paradoxically, on an effort to summon up external support to provide determinate weight in the conflict between alternative 'programmes' for Portugal's future: 'The Socialist Party, in view of the fact that there was a proliferation of participants in the political struggle, a lack of accord on the rules of the game, and limited space of manoeuvre within the state, sought a solution beyond national frontiers, by trying to pressure foreign countries to take part in the process and thus boost their interpretation of the Portuguese situation.' M. Milkman, *op. cit.*, p. 61. (Emphasis in the original.) With respect to Socialist Party strategy during and after the revolutionary period, see also Rainer Eisfeld (1983), "A 'Revolução dos Cravos

e a Política Externa: o Fracasso do Pluralismo Socialista em Portugal a Seguir a 1974", Revista Crítica de Ciências Sociais, no. 11, March.

72. Carlos Rosa Fernandes (1978), "Portugal and the Economic Community: some reflections on the Free Trade Agreements", Principal Assistant, Secretariat for European Integration, in the EFTA Bulletin. Jaime Gama, M.P. for the Socialist Party, declared in Parliament: 'the construction of Europe is the aim of the democratic forces of this country, and only those currents which, through manifest obscurantism, do not believe in the democratic and European future of our country, oppose it.' see J.C. de Azevedo, op. cit., pp. 282-3.
73. see J.M. Rolo, 1978, op. cit.
74. ibid. Murteira, as an economist, is 'certain' that Portugal's external dependence has increased since 1974: '(...) the circumstance of a situation of transition led to the increased external dependence of Portuguese capitalism, without, however, the political organization of the state having reassumed its pre-1974 repressive characteristics, which had resisted almost half a century of change factors heavily influencing the outcome of Europe and the world in this same period.' M. Murteira (1982), "Ruptura e Regulação da Economia Portuguesa nos Anos 70", Economia e Socialismo, April/June, p. 6.
75. see J. Correia Jesuino (1982), "Anomia e Mudança na Sociedade Portuguesa", in Mudança Social e Psicologia Social, Lisbon: Livros Horizonte.
76. To be seen, for example, in certain aspects of the Polytechnic Higher Education project, to be discussed below.
77. A flagrant example being Education Minister Vitor Crespo's Lei de Bases do Sistema Educativo (Projecto para Discussão Pública), April, 1980. Calvet de Magalhães wrote at the time of the period of public discussion of the Veiga Simão Reform

that Salazar, in 1937, had made it clear that it was up to the family to educate children of nursery school age (thus DL 28 081 of 9 October 1937 abolished pre-school education). With the Veiga Simão Reform pre-school education was placed back on the agenda (to be operationalized 'as soon as structures and resources permit'). After the 25th of April revolution, it became a priority, at least unofficially, with creches and nursery schools growing spontaneously all over the country. By the time of the publication of the Lei de Bases do Sistema Educativo (Projecto para Discussão Pública), in April 1980, most popular initiatives in the field of pre-primary education had succumbed to the rigours of austerity and the lack of central government support. The Lei de Bases, although recognizing the important place of pre-primary education in Portuguese society, breaks with the spirit of both the Veiga Simão Reform and the April revolution, not only in its general tone of discussion of the matter, but also by inserting the following clauses: 'Pre-school education in nursery school institutions is optional and an extension of the educational action of the family, with which it establishes an intimate partnership, recognizing that the family has an essential role to play in pre-school education.' see Chapter II, Section II, Paragraph 3 of Lei de Bases... On the influence of the Church, J. Salvado Sampaio, in a recent work, notes the following: '(...) contrary to constitutional prescriptions, primary school programmes, which entered into effect in 1980-81, foresee a "code of conduct founded on civic, moral and religious attitudes".' (Emphasis added by J. Salvado Sampaio.) see J. Salvado Sampaio (1982), "O Sistema Escolar Português", Análise Psicológica, no. 4, Serie II, April/May/June, p. 468. See also Cavet de Magalhães, "Educação Nacional: uma nova renascença?", in Vida Mundial, 29 January 1971.

78. see reference to the Estado Social in Chapter 2, footnote 15.
79. A survey was carried out in the Portuguese teacher training sector during the academic year 1978-9 as part of a project of the Open University directed by Dr. Roger Dale of the

Faculty of Educational Studies. The author of this thesis and Sacuntala de Miranda, of the Universidade Nova de Lisboa, also participated in this project. The research included informal interviews with technicians of the Ministry of Education and with well-known Portuguese educators, documental research and visits to Portuguese Colleges of Education (Escolas do Magistério Primário). see I.R. Dale (1980), Final Report: "An Examination of the Effect of International Agencies on Education Policy and Practice in Portugal", The Open University Research Committee.

80. The elevation of institutions of intermediate higher education to university-level higher education took place, according to Rogério Fernandes, in order to give such institutions both prestige and encouragement, in an attempt to give them both scientific life and dynamism. In a directly opposite vein, G. Braga da Cruz, some years before, referred to the need for some form of extra-university higher education (in his critique of the Veiga Simão Reform), but for reasons rather different from those of the Cardia Ministry: 'Today there is a common problem for all conceptions of the University without whose prior resolution there can be no university reform - that of saving the University from the masses; and, for this common problem, there is only one solution: the generalized structuring of a post-secondary education for the masses with a range of options similar to University courses.' (Emphasis in the original.) But who would have dared elicit such a reason after the 25th of April? see R. Fernandes (1977), Educação: uma Frente de Luta, Lisbon: Livros Horizonte; and G. Braga da Cruz (1973), Reforma do Ensino Superior, Lisbon, p. 5. It should be pointed out that there occurs a slight problem with the translation of 'ensino médio', for it was not exactly intermediate higher education. 'Ensino médio' was, prior to 25 April 1974, comprised of the 10th and 11th years of (non-lyceum) schooling.

81. Decreto-Lei no. 427-B/77 of the 14th of October 1977. see p. 2492-(5) of the Diário da República, 14 October 1977.

82. 'Ensino Superior da Curta Duração' became 'Ensino Superior Politécnico' with Decree-Law 513-T/79.
83. see DL no. 427-B/77.
84. see Ramiro Marques (1982), "Escolas Superiores da Educação: formar quem, como e para quê?", O Jornal da Educação, November, pp. 36-7.
85. World Bank Report no. 1807-PO, Staff Appraisal Report, Education Project, Republic of Portugal, April 3, 1978. see also "Plan for the Rationalization of Primary and Preparatory Teacher Training in Portugal", January, 1978 (M.E.I.C.).
86. World Bank Report no. 1807-PO, *ibid.*
87. *ibid.*
88. *ibid.* (Emphasis in the original.)
89. Paul Hirst, *op. cit.*, p. 119.
90. Good banking practice requires stability, guarantee of return on investment, etc.; factors one is unlikely to encounter during a period of mobilization.
91. Apart from the education project, the World Bank granted loans of 143 millions to Portugal during 1978: 1) 45 millions for financing small and medium firms; 2) 40 millions for improving Portugal's roads; and 3) 58 millions for the fertilizer industry. see Diário de Notícias, 23 September 1979.
92. It is the very disjuncture (or apparent disjuncture) between the ideological heritage of the Portuguese revolution and the educational politics resulting, at least in part, from the technical-function theory employed by the World Bank in its analysis of Portuguese education that we are seeking to

understand.

93. As we saw in Chapter 3, the democratic management of schools, in spite of having been 'toned down' by measures taken by Education Minister Sottomayor Cardia, is probably the most important, clear-cut, institutional change, directly a product of the revolutionary period, within education. Therefore the 'noises' that emerge, from both official and unofficial sources, suggesting that it may not be working need to be 'heard' with this fact in mind.
94. We should point out that World Bank policy has changed considerably over the past decade. In its celebrated 1974 Sector Paper, it sought to define a new policy in which the social and cultural aspirations of developing countries would be taken into account, and in which it was recognized that the combination of manpower projections and educational planning did not automatically lead to greater equity in the distribution of income, goods and statuses. Thus, for the promotion of balanced educational development the Bank proposed the following principles: 'a) there should be at least a minimum basic education for all, as fully and as soon as resources permit; b) further education and training beyond the basic level should be provided selectively to improve, both quantitatively and qualitatively, the knowledge and skills necessary for the performance of economic, social and other developmental roles; c) a national education system should be viewed as a comprehensive system of learning, embracing formal, nonformal and informal education, all working with the maximum possible internal and external efficiency; and d) in the interests of both increased productivity and social equity, educational opportunities should be equalized as fully as possible.' On the subject of the Bank's changes in policy, Paul Hirst has written: 'It is not an exaggeration to say that the Bank has played a primary role in bringing about radical rethinking during the 1970s of educational policy in developing countries, which is in turn related to a major reorientation of general developmental goals in which the Bank has played a prominent part.' see P. Hirst, op. cit., p. 117. In

fact, it probably is an exaggeration to argue that the Bank has played a primary role in bringing about radical rethinking during the 1970s of educational policy in developing countries. The important question is, of course, has this change in policy made itself felt at the level of World Bank practice in individual countries? see note 105 below for comments on the changes in the Education Sector Policy Paper, 1980 of the World Bank.

95. World Bank Report 1807-PO, op. cit. (Emphasis in the original.)
96. World Bank Report 1977, op. cit. (Emphasis in the original.)
97. *ibid.*
98. Certainly no one can accuse the Bank of not being subtle. see Luis Ribeiro (1977) who attempts to look behind the façade. in "Banco Mundial: relatório 'técnico' procura esconder estratégia política", O Jornal da Educação, no. 3, June, p. 11.
99. World Bank Report 1977, op. cit. (Emphasis in the original.)
100. Among others, by Lydia Aran, S.N. Eisenstadt and Chaim Adler (1972), "The Effectiveness of Educational Systems in the Process of Modernization", Comparative Education Review, 16; by Christopher Jencks, *et.al.* (1973), Inequality, London: Allen Lane; by Athar Hussain (1976), "The Economy and the Education System in Capitalistic Societies", Economy and Society, 5 (4); by Randall Collins (1977), "Some Comparative Principles of Educational Stratification", Harvard Educational Review, 47; by Randall Collins (1980), The Credential Society, New York: Academic Press; by Ivar Berg (1970), Education and Jobs: the Great Training Robbery, Baltimore: Penguin Books; see also Thomas Labelle and Robert Verhine, op. cit., for a review of the American literature on this issue.
101. see Roger Dale, 1981, op. cit.

102. Stephen Ball, op. cit., p. 303.
103. *ibid.*
104. Martin Carnoy has argued that the only way a country can achieve increased equality is for it to expand greatly primary and secondary education at the expense of university education, and to introduce at the same time an incomes policy to equalize salary differences between higher and lower diplomas. This would, in fact, amount to an 'uncoupling of the duo educational achievement-occupational position'. Are such measures possible in conditions other than those of mobilization? see M. Carnoy, 1981, op. cit.; R. Dale, 1981, op. cit.
105. Aklilu Habte (1981), 'Education and Development' Course E353, Unit 5, Milton Keynes: The Open University. In its 1980 policy paper the Bank attempts to specify more clearly the role education has in development. It is argued that education helps raise political consciousness, increases the number of skilled workers and provides advanced techniques, and is instrumental in 'nation-building' - i.e., that process whereby the raising of an individual's consciousness is said to orient him/her (to prepare him/her) for participation in the life of the nation and of the world. see Education Sector Policy Paper, World Bank, 1980, Washington D.C.
106. The discussion of priorities in Portugal, between the Bank and the Education Ministry, has not, however, always been smooth. Although fundamentally there has been agreement, some points have required considerable negotiation. This was true, for example, on the important point of the number of old Teacher Training Institutes to be closed. see interview with education technician Maria José Rau, 'Education and Development' Course E353, Unit 5, Milton Keynes: The Open University, 1981.
107. P. Hirst remarks that, 'In theory agencies respond to official requests positively or negatively, but in practice there is a great deal of agency activity in identifying and designing suitable projects and programmes and "ventriloquising" requests

for them.' P. Hirst, op. cit., p. 124.

108. Not that the EEC may not bring benefits to Portugal's education system. Keiner and Wickham have argued for such potential in terms of EEC law in Judy Keiner and Ann Wickham (1980), "Education and the Law: the case of the EEC", International Journal of the Sociology of Law, 8.
109. This is accomplished not only through the reestablished hierarchy of the education ministry, but also through official proclamation and through control of important sectors of the mass media, particularly television and radio.
110. One can ask the same question at a more general level. Witness for example the following extract from a work by M. Debeauvais on the 'advantages' of international computerised services: 'The time can already be foreseen when governments will follow the development of their educational systems just as carefully as that of the Gross National Product. Banks of national data connected together in a world network would ensure the availability of data based on sets of indicators relating to educational systems, financial and human resources used annually, their development from one year to the next, the cognitive results achieved by the pupils, diplomas obtained according to levels and types of education, and so on. A standardized system of "National Educational Accounts" would make it possible to work out aggregates comparable to those of Economic National Accounts: a "Gross Educational Product" would measure the knowledge and professional qualifications produced (or transmitted) in the course of the year, and a "Net Educational Product" would provide a figure after deducting annual depreciation through obsolescence, death or migration.' The role of the international organizations in all this, according to Debeauvais, would be to direct national decision-makers to the appropriate computerised data for the rapid solution of educational problems. see Michel Debeauvais (1980), "The Role of International Organizations in the Evolution of Applied Comparative Education", Brian Holmes (ed.), Diversity

and Unity in Education, London: George Allen and Unwin, p. 21.

111. This information was ascertained through informal conversation and interviews carried out with various technicians of the Ministry of Education involved in the Polytechnic Higher Education project. see, for example, the interview with Maria José Rau, op. cit.
112. According to a Portuguese technician working under the Secretary of State for School Equipment. Part of the agreement with the World Bank was that Portuguese authorities would purchase most necessary equipment for the Escolas Superiores da Educação from international suppliers.
113. It goes almost without saying that state employees have carried the debates going on within civil society into the Education Ministry. Once there, however, there are, in a period of 'normalization', considerable constraints working against their expression.
114. The 'Preliminary Programme of School Installation' (DGES, January, 1978), dealing with the new colleges of education, had as its theme: 'The promotion of education in the localities where the colleges are to be inserted.' Indeed, throughout the programme there is a concern to modify traditional practices that have kept the Portuguese College of Education in a relatively isolated state (not because it has been situated 'above' the community, but rather because of its minimization both as an educational institution and as an institution serving the community - the treatment these schools received under Salazarism is discussed in Chapter 1). The 'preliminary programme' called for a 'permanent participation of staff and students' both within the new schools and within the local community. Teaching practices, formerly held in schools annexed to the Colleges (and hence directly under the control of the Colleges), are to take place in the future, 'in the schools of the community'. In short, a major plank of the 'preliminary programme' was a concern to weaken the boundary

between the College of Education - and through the teachers it prepares, the primary school - and the community. Thus, there was implicit in the programme an attempt to weaken the boundary between everyday community knowledge of teacher and taught and educational knowledge. see Preliminary Programme (of School Installations), January, 1978, Direcção-Geral do Ensino Superior, Escolas Superiores da Educação.

115. In addition, DL 513-T/79, which emerged under the Government headed by Maria de Lourdes Pintassilgo (during the last few months of 1979), decreed that the Polytechnic Education Sector would engage in direct collaboration with the cultural development of regions and would contribute to the local community. see R. Marques, op. cit.
116. see Rui Grácio (1968), Educação e Educadores, Lisbon: Livros Horizonte, p. 168.
117. Thomas J. LaBelle and Robert E. Verhine point out that a major problem with technical-function theory is that it 'presupposes a type of schooling which teaches and selects for skills and qualities leading to occupational success in an industrial economy'. Thus they suggest that Latin-American formal schooling, which in general reflects the values of a traditional, aristocratic society, may clash with the presuppositions of technical-function theory (these being, to reiterate, that 1) education provides specific skills and/or general capabilities required for employment, 2) educational requirements tend to rise as technological change creates need for more highly skilled workers and 3) school credentials thus prove that an individual possesses the skills and knowledge necessary for economic production). Might one argue that António Sérgio foresaw this same clash in Portugal over 50 years ago? see also L. Aran, S.N. Eisenstadt, and C. Adler, op. cit.
118. R. Grácio, op. cit., pp. 168-173.

119. *ibid.* see also Rogério Fernandes's discussion of Sérgio's contribution, in R. Fernandes (1967), Ensino: Sector em Crise, Lisbon: Prelo Editores, pp. 75-83. In addition, there is Sérgio's own work, O Ensino como Factor de Ressurgimento Nacional, Oporto, 1918.
120. R. Grácio, 1968, *op. cit.*
121. R. Fernandes, 1977, *op. cit.*, p. 136. (Emphasis in the original.)
122. Always problematic, as well known. Holly suggests that the main tension results from the fact that the economy 'requires trained people at differentiated times', while education is 'for generally enlightened people at a single unitary level'. Douglas Holly (1982), "Learning and the Economy: Education under the Bolsheviks, 1917-1929", History of Education, vol. II, no. 1, p. 41.
123. 'The Hour is One of Action and Not of Words' - front-page headline of Esquerda Socialista, June 13, 1975.
124. R. Fernandes, 1977, *op. cit.*, p. 138. (Emphasis in the original.)
125. *ibid.*, p. 136.
126. World Bank Report 1807-PO, *op. cit.*
127. This is discussed in Chapter 1.
128. see Proposed Law for Creating the Foundations of the Education System (Lei de Bases do Sistema Educativo (Projecto para Discussão Pública), April, 1980, pp. 7-8. DL 47 587 of 17 March 1967, referred to by V. Crespo, was created to allow the Ministry of National Education 'to determine or authorize the carrying out of pedagogical experiments in establishments of public learning dependent on the Ministry to an extent further

than that which allowed under present legislation.' This Decree-Law was used often to justify projects which rarely became permanent features of the education system. It also allowed the transfer of personnel from one sector of the system to another (called in Portuguese 'destacamentos').

129. Vitor Crespo, Minister of Education for the 'Aliança Democrática' (an alliance of Social-Democratic, Christian-Democratic and Monarchist Parties) from 1979 to 1982, found himself forced to resign, without seeing his Lei de Bases... approved, as a result of being highly contested both on the Left and from within his own coalition.
130. see Chapter 2.
131. A. Teodoro argues that as a result of the agreement between international financial institutions (IMF, World Bank) and the Portuguese Government, the budget for the education sector decreased from 19% of the OGE (General Budget) in 1976 to 13% in 1978. The fact is, as one can verify in the chart of % of G.N.P. spending on education in Appendix X, that although spending declined considerably from the high point of 1975 (4.9% of G.N.P.) to the low point of 1979 (3.2% of G.N.P.), it did increase considerably in the year 1980 (4.3% of G.N.P.) . Since 1980 education's share has slowly decreased. see António Teodoro (1983), O Sistema Educativo Português, Lisbon: Livros Horizonte, p. 25.
132. see O Jornal da Educação, April 1979, p. 8.

### Conclusion

If we were to draw up a balance sheet of Portuguese education at the end of the decade of the seventies, showing debits and credits, we would have to admit that the 'endemic deficiencies' of the Portuguese education system, identified at the beginning of this study as an inability to translate policy into practice and as a lack of resources, were still very much present.<sup>1</sup> Which, in spite of a decade of considerable social and educational mobilization, is not totally surprising. Revolutions do not necessarily create the conditions for rapid economic development, nor the conditions conducive to the rapid translation of policy into practice.<sup>2</sup> But what revolutions, as periods of intense, profound social change, do achieve is an alteration in the distribution of political and economic power within a given society. And if, as Williamson suggests, the 'form, content and distribution of education reflect the distribution of power in society',<sup>3</sup> then this means that fundamental educational change also occurs, for 'it follows (...) that change in education always follows on from changes in the distribution of power.'<sup>4</sup>

The quotation from J. Karabel and A.H. Halsey which we cited in the introduction to this thesis emphasizes, just as Williamson does, the fact that revolutions transform education: 'Revolutions do not merely make educational change possible, they require it. They must transform the educational system and bring it into harmony with the new institutional and ideological framework.'<sup>5</sup> Now while we agree basically with this position, we have tried throughout the course of this work to elaborate it further and to locate the motor of educational change that revolutions have the effect of putting into high gear. This has obliged us, through a

consideration of the particular case of Portugal, to approach the general problem of the relative internal and external autonomy of the state and education.

Effectively, we have tried to show that it was the changing nature of the Portuguese state that both shaped and permitted educational change in Portugal during the decade of the seventies. We chose the decade of the seventies in Portugal precisely because it was a period of important structural change in economic, political and cultural activity, change highlighting distinctions less marked in more 'stable' countries. Thus, in the course of one decade it was possible to demarcate three periods, each period being distinguished by a major educational event: the period from 1970 to the April revolution in 1974, encapsulated in the Veiga Simão Reform in education; the revolutionary period from April 1974 to the taking of office by the 1st Constitutional Government in 1976, typified by the mobilizing activities of the revolutionary period which included the introduction of democratic management into schools and universities and centrally-planned and controlled mobilization activities such as the MFA Campaign of Cultural 'Dynamization'; and the period from 1976 to 1980, illustrated by the intervention of the World Bank in Portuguese higher education. And in each period there occurred an important change in the nature of the Portuguese state. During the period of the Veiga Simão Reform, the state, in spite of an increasingly severe crisis provoked to a large extent by the incapacity of Portuguese rulers to find a solution to the problem of decolonization and by a state administration unable to adapt to the changes required for the modernization of Portuguese society, managed to maintain its dominance over civil society. However this was a dominance in

crisis, increasingly unable to capture, organize and articulate the demands of civil society. We have argued that the Veiga Simão Reform was precisely the attempt to bridge the gap between state, civil society and economy: it appeared to provide a source of new legitimation for a regime in crisis and at the same time to orient education through educational planning towards economic goals which would be enhanced by the creation of an 'open, diversified, individualized, inter-related, in short, modern, school system on the OECD pattern'.<sup>6</sup> The sudden arrival of the revolution of 1974 suggested that, in the end, the Reform only managed to widen the crack in the already straining dam by providing a platform on which popular dissent could be voiced.<sup>7</sup>

With the bursting of the dam which began on the 25th of April 1974, the Portuguese state found itself submerged by the flood of energies and organizations of a newly (and hurriedly) composed and revitalized civil society. The mobilizing currents of 'alfabetização' and 'poder popular' provided the political expression of the structure and the dynamics of, on the one hand, the disarticulation of the ideology and practices of the Salazarist regime, and of, on the other, the attempt to define Portuguese society as 'in a state of transition between capitalism and socialism'. Finally, the recuperation of the state with the onset of 'normalization' and the redefinition of the boundaries between the state and civil society, aided by the guidance and resources of international organizations, led to a re-coupling of education and economic growth, although now in the context of a stronger, more capable and more resisting civil society.

Processes of Educational and Cultural Mobilization

One of the major objectives of this thesis was to analyze in some detail the processes of educational and cultural mobilization that provided the context for, and made possible, the transformation of important aspects of the education system. Indeed, these mobilization processes resulted in what we termed the 'conquests of the revolution'.<sup>8</sup> We suggested, in broad terms, that a period of mobilization corresponded to a period of rupture, a period of heightened social struggle, a period when ideology moved to the forefront. Education, thus, in a period of mobilization, finds itself highly politicized, for it voices and transports the debate over the construction of a new organization of social and economic forces. This, in sum, was the debate at the heart of our claim that a new rationale was in the process of being constructed in Portuguese education during the decade of the seventies.

The construction of this rationale took place in two phases. Although we have argued that political and economic mobilization only became absolutely apparent with the coup d'etat of April 25, 1974, educational mobilization was already apparent (though not recognized as such at the time) in the Veiga Simão Reform. With the advent of the Veiga Simão Reform the arena of education became the key site in mediating the demands emerging from civil society in the form of a focal point, a pivot, for the debates over the development and the modernization of the country. Allied to these debates were the Reform's subordinate tasks of preparing new cadre and qualified technicians for this process and the transmission of the 'collective values' inherent to it. As a pivot for the debates, the Veiga Simão Reform was not neutral to them. During the phase of its introduction it vociferously supported the project of the

meritocracy in Portugal, although in its final phase it did so only half-heartedly. But in giving voice to the call for equality of opportunity in education, the Reform undoubtedly facilitated the voicing of the demands and protests of those excluded and silenced not only by the education system but by the political regime in general.

The second phase of education's contribution came after the intervention by the military and during the two-year revolutionary period. Whereas the first phase of educational mobilization took place mostly, but not only,<sup>9</sup> at the level of policy and legislation, the second phase took place within the schools and among the population. Regardless of its successes or failures, it was the mobilization of people and not just ideas. The degree of intervention of education and its contribution to social change depends on the political context surrounding it. With the Veiga Simão Reform we found that education's mobilizing capacity stemmed from the political, economic and social crisis that characterized the early years of the decade of the seventies. The crisis gave education a general importance and an autonomy that it had lacked in its condition of contributor to economic development during the 'normal' (i.e. non-crisis) conditions of the decade of the sixties. The active role of education, in the expansion and 'democratization' of education, was needed to legitimate a regime in crisis. However, later, with the effective 'absence' of the state after the revolution of 1974, education found itself, paradoxically, with less autonomy from economic considerations in general, but in a situation where it could participate in the definition of the economy. This participation of education, in a period of institutional crisis, was mediated largely by civil society, either directly

through the occupation of the schools and universities, or indirectly, via civil society's influence in the organization that was the MFA, or through the weakened, but still functioning, state ministries. We argued that it was during this second phase that the new rationale based itself on three premisses: 1) that the local community (both urban and agrarian) needed very much to 're-identify', to re-establish itself in the light of new national realities; 2) that a great effort should be made to overcome the more blatant differences between urban and rural schooling; and 3) that a similar effort should be made to attenuate, if not abolish completely, the consequences of the mental-manual division resulting from different forms and contents of schooling. These premisses were essential for the harmonious transformation of the education system in order to bring it in line with the (temporarily) new institutional and ideological framework that was Portugal 'in transition to socialism'. Thus, in the particular experience that was the Portuguese revolutionary process, education was able to not only respond to the establishment of new centres of power and redefined institutions, but also to play a role in the actual definition of the revolutionary process itself (a process not clearly defined by abrupt and clear changes in the political and economic spheres).

The processes of educational and cultural mobilization came to an end with the establishment of pluralist democracy - at least in terms of the functioning of its institutions - symbolized by the formation and taking of office by Portugal's 1st Constitutional Government of the post-revolutionary epoch. The period of 'normalization' initiated by this event had the task of bringing education into harmony with the new institutional and ideological framework

that was pluralist Portugal. We have argued that this was a period of exclusion par excellence. The objective was not to exclude all new forms, content and distribution of education,<sup>10</sup> but to exclude those forms, that content and that distribution that threatened to jeopardize the 'proper' functioning of a pluralist Portugal. More than anything else this meant/ reestablishing the authority of the state within education. As we have seen, this included a series of measures aimed at making the limits of the education system known. Thus, where schooling could take place was (re)defined; who could participate in schooling was (re)defined; what would count as the content of schooling and the manner the transmission and acquisition of this content would be assessed was (re)defined. This was accomplished, in general, by excluding those forms and contents symbolizing to the greatest degree 'Portugal in transition to socialism',<sup>11</sup> and by reestablishing, at least partially, the weight of hierarchy throughout the education system.<sup>12</sup>

#### Changes that Actually Occurred

How was education in Portugal at the end of the decade of the seventies different from education in Portugal at the beginning of the decade of the seventies? At the end of Chapter 4 we referred to the 1970s as a decade which made clear the link between democracy and education in Portugal, 'in terms of a form of schooling that is community based, meaning 1) that education, and culture more generally, play a vital role in constructing and maintaining a democratic society, and 2) that for education in Portugal to be democratic, it must be participatory and egalitarian (striving

for equality).' Indeed, at the end of the decade of the seventies, the 'community' that made up 'Portugal' was no longer the 'community' that had formed 'Portugal' at the beginning of the decade. Decolonization and mobilization in the seventies found themselves intimately, yet almost imperceptibly, linked for mobilization came to mean the rediscovery of 'Portugal'. This process of rediscovery was, potentially, in itself, a process of democratization for it meant 'finding' and 'knowing' the community that was to be Portugal.<sup>13</sup> This in turn meant forming citizens for a society based on new forms of political and economic democracy. And the revolution assured that this democracy went beyond the limits of mere rhetoric: it put into practice participatory forms of democracy (the democratic management of schools) and made egalitarianism a major plank of its Constitution.

It is perhaps important to distinguish between those changes in education which were either directly provided by the revolution (such as the democratic management of schools) or which came about as a result of the new social and political context created by the revolution (such as the creation of independent trade unions for teachers, a career structure for teachers, 'unificado' in the secondary schools, etc.),<sup>14</sup> and those changes which were either of short duration due to their nature (i.e. 'campaigns') or of short duration due to the onset of 'normalization' and their consequent exclusion (for example, the Student Civic Service, the discipline Civic Polytechnic Education, the Contact Activities of the Teachers Training Colleges, etc.). With regard to the latter changes, which were aimed essentially at changing attitudes, at providing fundamental knowledge or skills, or at stimulating the development of local culture principally in order to consolidate or extend the new distribution of political and economic power (in short, at forming

citizens for a democratic, and possibly 'socialist', society), it is difficult to judge their long-term effect. As Joyce Riegelhaupt has pointed out:

'Perhaps a starting point for another type of analysis of the long-term impact of the revolution will be found, not so much in the formal institutional changes that have been accomplished, but in the cultural forms of discourse and exchange that may have been much more rapidly altered. One cannot escape being struck by the changes that have occurred in language and by the removal of the restrictive patterns of deference that characterized this previously highly stratified society.' 15

With regard to the former, they are the embodiment of the shift of power within education that followed the shift in the distribution of economic and political power that accompanied, that indeed comprised, the April revolution. There can be little doubt that teachers, students and the underprivileged sectors in education, including adults, workers and women, strengthened their respective positions within the education system during the decade of the seventies.<sup>16</sup> There are almost certainly some (such as the nostalgic former followers of Veiga Simão) who would like to say that all the concrete measures favouring teachers, students, adults, workers and women, with the exception of the democratic management of schools (indeed an important exception!), were already present in the pre-revolution Veiga Simão Reform. We have shown that this is only partly true. The Veiga Simão Reform was incapable of finishing that which it started;<sup>17</sup> it was in a very real sense, from the beginning, disconnected from social reality. It was responsible for initiating the process of educational mobilization of the seventies, but it could not carry it through.

To assess the general situation of education in Portugal at

the end of the decade of the seventies we need to know what the major demands being made on the Portuguese state were at that time. This does not mean that such demands were directly imposed on, or even accepted by, the education system, but it does mean 'that they (would) remain on the agenda and retain high priority for those controlling finance for education.'<sup>18</sup> The sudden, thoroughgoing change of the revolution confirmed new supports for Portuguese civil society: a form of parliamentary democracy, the formation and/or strengthening of pressure groups of various order and an economy oriented towards integration in the European Economic Community. As we have seen, the 'normalization' of the revolution resulted in the exclusion of most of its anti-capitalist aspects. Our study of the intervention of the World Bank in Portuguese education has argued that the major demand on the state in the area of education at the end of the decade of the seventies was the one of making education more relevant to the needs and functioning of the economy. Coming in the wake of a revolution and more than half a decade of educational mobilization, this meant more than anything else 'depoliticizing' education through the reformulation of educational problems in technical terms.

Now it is clear from the analysis that we have carried out throughout this thesis that we do not equate 'national development' with economic growth. In fact, we demonstrated that the severance of 'national development' from economic growth was strikingly apparent and intended in Salazar's Portugal of the 1930s and 1940s, and during the revolutionary period. In both these periods we found that economic activity was made to fit a conception of social change defined more in terms of national well-being than in terms of economic growth. Particularly during the revolutionary period, the

possibility of the dominant conception of national well-being taking the prime role in directing social change, and of economic organization being made to fit that conception rather than vice versa, became actively debated and clearly was not explicable in terms of any theory (such as modernization theory) insisting that economic growth must lead 'development', indeed that 'development' is dependent on economic growth.

We have further suggested that it is very difficult to argue that the functioning of the Portuguese state and education system can be 'read off' either from the 'needs' or demands of neo-colonizers and multinationals or of the dominant fraction of the bourgeoisie, or from its 'semi-peripheral' or 'peripheral' status. Rather it has been argued that while the kinds of problems faced by the state in Portugal are largely generated by the country's historical international economic and political positions, the precise forms taken by the responses to these problems draw on specifically Portuguese blends of political, cultural and ideological resources.

Early on in this thesis we hypothesized that in the process of its revolution Portugal may have temporarily lost its 'peripheral' status. Suddenly, the Portuguese became almost obsessively aware of their own 'realities'. Thus, inevitably, the two-year period of well-merited self reflection focussed on the question of national independence, which was actively debated and interpreted as many different things by different social forces. We have argued that from the experience of this period there developed on the part of many Portuguese an acute sensitivity (not entirely unable to build on a certain 'hostility' of the Salazarist regime) to what are, in fact, two major problems for the education system: a) the subordination of the Portuguese economy and education system to the

demands and requirements of international finance and/or the expertise and advice of international organizations, and 2) the ignorance of the education system of 'Portuguese realities', a fact exacerbated by the importation of educational methods, content and even personnel from, mainly, Western capitalist countries.

In summary, what we want to argue here, and this is expressed tentatively in the conclusion to Chapter 5, is that at the end of the decade of the seventies in Portugal there existed a clash between two major demands on the Portuguese state, both of which were strongly felt in the education system. The first of these was the demand that the long-frustrated desire for the modernization of the country must find some response, not just in terms suitable to economic growth but also to protect pluralist democracy in Portugal (an objective made much more difficult by capitalism's international recession). The other was the demand that the protection of Portuguese national well-being must find some response. This was interpreted mainly as the protection of the 'Portuguese realities' 'found' and 'created' by the revolution - that is, their protection from internal and external, but mainly external, capitalist, manipulation and exploitation.

We predict that education in Portugal in the 1980s will continue to suffer the effects of the clash between these two major demands on the Portuguese state. Evidence for the validity of this prediction might be the seemingly endless 'normalization' process. The decade of the seventies closed with the election to power of the right-wing 'Democratic Alliance' (Aliança Democrática), headed by the 'liberal' 'opposition' M.P. from the early years of the decade of the seventies, Sá Carneiro. Although in the field of educational policy there were no significant changes in the first

years of the decade of the eighties, revolutionary conquests, such as the Agrarian Reform, have increasingly suffered a process of erosion. Certainly the pace of 'normalization' would have been quickened, if the Governments of the 'Democratic Alliance' had not been constrained, not only by their slender electoral victories, but also, officially, by the 1976 Constitution, by a President of the Republic with whom they were in increasing opposition, and by the 'Council of the Revolution'.<sup>19</sup> In 1983, with the election to power of the Socialist Party, and an ensuing alliance established by the Socialists with the Social-Democratic Party in the name of forever sought-after 'stability', and with, in addition, the extinction of the 'Council of the Revolution',<sup>20</sup> there are plans to reopen the Portuguese banking system to private enterprise (the nationalization of the banking system after the events of 11 March 1975 was considered by many at the time as symbolic of 'Portugal in transition to socialism'; later it was considered a major bulwark against the possible resurgence of financial capital).

Further research should concentrate on the elaboration of the effects within the education system of the clash between the renewed call for the modernization of Portugal and the demand that this modernization process be encased within a societal project 'developing' national well-being. This means researching how the education system in the 1980s is mediating these societal demands into educational practice. Thus the experience that has been, and continues to be, gained by teachers' trade union organizations, by the experience of the democratic management of schools and universities, and by the first steps towards comprehensivization of secondary education needs to be examined and assessed in the light of this problematic. Also the structural forces (capital accumulation and in turn

social control and legitimation) shaping the arena in which the processes of education are worked out and which '(...) provide the inputs on which the processes operate, and constrain or encourage the implementation of the processes',<sup>21</sup> need to be researched particularly in light of the implications of Portugal's continuing dependence on external loans (which will in all likelihood mean less money for the education sector),<sup>22</sup> and in light of Portugal's entry into the European Economic Community in the relatively near future.<sup>23</sup>

Among the stated objectives of this thesis was 'a preliminary assessment of both policy and experiences' in order 'to influence the formulation of future education policy in Portugal.' It was hoped that in carrying out this 'preliminary assessment' we might make a modest contribution to the establishment of 'Portuguese realities' in education. This thesis has quite clearly been an attempt to promote social change, rather than merely describe it, by arguing for the defence of the April revolution in terms of the changes it brought about in education. The inexorable logic of the normalization process has been to 'normalize' the revolution and its effects into a non-event, to 'naturalize' the revolution as either 'dead', or as never having been a 'revolution'. By intervening at the level of the clarification and definition of educational problems, or of problems for education, we have tried to contribute to the formation of the (changing) context in which educational policy is made. Thus we have tried to contribute to the historical specificity of the educational state apparatus as a whole, firstly by characterizing education in relation to specific Portuguese conceptions of national development over a period stretching from the late 1920s to the end of the decade of the 1970s, and secondly

by characterizing a very specific process of educational change which took place in Portugal during a recent decade. If we have been successful in this task then we feel we have met our objective of making a modest contribution to the establishment of 'Portuguese realities' in education.

Footnotes to the Conclusion

1. If we, for example, refer back to the 1965 report, 'Recent Evolution of the Portuguese School System', cited by S. de Miranda (see Chapter 1), we find that the 'shortcomings' noted then are still prevalent fifteen years and more than half a decade of educational mobilization later. (The report noted the following shortcomings: 1) shortest period of compulsory schooling in Europe; 2) poor school attendance; 3) very low continuation in school beyond compulsory schooling age; 4) inadequate coverage of the country with official schools and shortage of teachers properly trained; 5) low productivity of almost all parts of the system; 6) low level of student interest in economically necessary subjects; 7) inadequately structured teaching system; and 8) insufficient and frequently deficient professional training after leaving school.) see S. de Miranda (1978), "Portugal e a O.C.D.E.: expansão económica e planificação educativa", in Vértice, vol. XXXIV, May/June. see also statistics on education in Portugal in Appendix 1. One very significant difference between 1965 and 1980 is the % of G.N.P. spent on education: 1.7% in 1965 and 4.3% in 1980. see Appendix X for table of % of G.N.P. spent on education in Portugal and the United Kingdom (note that Portugal's 4.3% in 1980 is well below the U.K.'s 5.5%).
  
2. T. Skocpol and E.K. Trimberger argue that '(...) historically, revolutions have changed state structures as much, or more, than they have changed class relations of production and surplus appropriation.' In all cases studied by Skocpol and Trimberger (France, Russia, China, Turkey and Japan), state structures suddenly became much more centralized and bureaucratic (which seems to mean for Skocpol and Trimberger that national economic development became state-guided or state-initiated). The authors argue that part of the reason for the need to create larger, more centralized and more bureaucratized state organizations lies with the fact that it is the only way that such states can hope to cope with the international pressures that helped create the revolutionary crisis in the first place. Portugal's post-revolutionary 'vulnerability' to international pressures thus

might indicate, at least for Skocpol and Trimberger, that Portugal's revolution was/is still 'unfinished'. see Theda Skocpol and Ellen Kay Trimberger (1977-8), "Revolution and the World-Historical Development of Capitalism", Berkeley Journal of Sociology, vol. XXII, p. 133 (emphasis in the original); see also pp. 126-134.

3. see Bill Williamson (1979), Education, Social Structure and Development, London: Macmillan, p. 207. Williamson elaborates an idea developed by Basil Bernstein in Class, Codes and Control, Vol. 3, especially Chapter 5, "On the Classification and Framing of Educational Knowledge", and in Chapter 8, "Aspects of the Relation between Education and Production", London: Routledge and Kegan Paul, 1977 (2nd edition).
4. Bill Williamson, 1979, *ibid.*
5. Jerome Karabel and A.M. Nalsey (eds.) (1977), Power and Ideology in Education, New York and Oxford: Oxford University Press, p. 551. (Emphasis in the original.)
6. see Chapters 1 and 2.
7. The attempt to fold up this platform in the Reform's later stages meant that the Reform largely defeated its own purposes.
8. see Chapters 3 and 4.
9. We have referred to the public debate initiated by the introduction of the Reform, and to the 'Study Groups' reaction to it, in Chapters 2 and 3.
10. As we have seen, the Constitution of 1976 itself guaranteed greater distribution of educational resources 'to workers and their sons and daughters'.
11. This is discussed extensively in Chapters 3 and 4.

12. see particularly Chapter 3 and the discussion of the changes in the laws governing the democratic management of schools and universities.
13. Of course, later, when 500,000 returning settlers began to make their presence felt in Portugal, decolonization became more 'perceptible', and the 'rediscovery' of Portugal took on an entirely different meaning. By this time the revolutionary period had come to a close.
14. To this day a career structure for teachers only exists in law for university teachers. It has, however, been repeatedly promised to other teachers and makes up one of the major demands of the teachers' union organizations.
15. Joyce Riegelhaupt (1983), Introduction to L.S. Graham and D.L. (eds.), In Search of Modern Portugal: the April Revolution and its Consequences, London: University of Wisconsin Press.
16. According to the Constitution of 1976, women have the same rights as men in Portuguese society and under Portuguese law. Unfortunately, in many respects, the law, not to mention society, has not yet caught up with the Constitution.
17. Unless, of course, one argues that Veiga Simão himself was plotting the April revolution!!
18. see Roger Dale (1983), "The Political Sociology of Education", British Journal of Sociology of Education, 4, 2, p. 44.
19. The trade unions have also been a major constraint. As for the 'Council of the Revolution', its most publicized resistance to 'normalization' was its refusal to allow, on three separate occasions, the 'Democratic Alliance' to reopen the banking system to private enterprise.
20. The 'Council of the Revolution' disappeared, as planned in

the 1976 Constitution, with the conclusion of the revision of that same Constitution in 1982.

21. see R. Dale, op. cit., p. 21.
22. At the time of writing a second loan 'package' is being negotiated between Portuguese Government officials and the IMF. The major theme of the negotiations appears to be, still, 7-8 years after the first IMF package agreement, 'stabilization' of the Portuguese economy. One of the major planks of the agreement is decreased public spending, including decreased spending on education.
23. M. Murteira has argued recently that '(...) the ideology of European integration was assumed at a political level, but not explicitly at the economic level, by public powers which did not motivate any coherent effort at transforming the national productive structure.' Thus, a 'structural blockage of Portuguese society arises, in a way, as cause and effect of the democratic regime, at least in terms of the way it has functioned since 1976. (...) the transformations brought about in 1974-75 have not been prolonged by measures installing a new (economic) logic, or normality of a "remade economic system".' The problem with Murteira's argument is that in its exclusive concern with economic considerations it provides political ammunition for those in opposition to the economic transformations associated with the revolution. For they, too, claim that a 'structural blockage' has occurred, and that the only way to relieve it is to remove all traces of the revolution from Portuguese institutions and from the Portuguese economic system - which would logically include the democratic regime itself! see M. Murteira (1982), "Ruptura e Regulação da Economia Portuguesa nos Anos 70", Economia e Socialismo, April-June, p. 17.

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## Appendix I

Duration of Compulsory Schooling and Rate of School Enrolment in 1975 (in thousands)					
Countries	Compulsory Schooling	Population	Enrolment	% 3/2	
	Age Duration				
Bulgaria	7-16	8	8 679	1 866.7	21.5
Spain	6-15	10	35 225	7 629.1	21.7
France	6-16	10	52 507	13 115.2	25.0
Greece	5-15	10	8 962	1 738.6	19.4
Holland	6-16	10	13 541	3 579.8	26.4
Italy	6-14	9	55 361	11 836.5	21.4
Yugoslavia	7-15	8	21 160	4 103.3	19.4
Portugal	7-14	6	9 449	1 702.0	19.5
G.D.R.	7-16	10	17 166	4 089.7	23.8
F.R.G.	6-15	9	62 041	13 733.2	22.1
Romania	6-16	10	21 029	4 297.8	20.4

Source: José Salvado Sampaio (1980), Portugal, A Educação em Números, Lisbon, Livros Horizonte, p. 27.

Level of Education of the Portuguese in 1974 and 1981*		
Level of Education	1974	1981
Do Not Read or Write	32.2%	26.5%
Read and Write, but No Diploma	23.2%	15.2%
Basic (Primary and Preparatory = 6 Years of Schooling)	39.5%	48.5%
Secondary	3.8%	8.1%
Higher	0.8%	1.4%
Teacher Training	0.4%	0.3%

Source: Adapted version of table presented by Nuno Pacheco in O Expresso, 1 April, 1983.

\* Refers to Continental population with age of 10 years or more; the percentages are based on the Questionnaire to Families which was carried out by the National Institute of Statistics during the 2nd half of 1981.

Percentage of Population Illiterate (15 Years and Older)				
Countries	Years	% Illiterate (total)	Male	Female
Bulgaria	1965	9.4	4.5	14.1
France*	1946	3.6	3.3	3.8
Greece	1971	15.6	6.7	23.7
Hungary	1970	2.0	1.6	2.4
Italy	1971	6.1	4.7	7.4
Poland	1970	2.2	1.3	3.1
Portugal	1970	29.0	22.4	34.7
Romania	1956	11.4	6.1	16.3
Spain	1970	9.8	5.7	13.6
Yugoslavia	1971	16.5	8.1	24.3

\* 14 and Older

Source: Statistical Yearbook 1977, UNESCO, 1978

Illiteracy Rate, by Sex (Portugal) (6 Years and Older)						
Years	MW	Ratio	M	Ratio	W	Ratio
1920	66.2	100	58.1	100	73.3	100
1930	61.8	93	52.8	91	69.9	95
1940	49.0	74	41.2	71	56.1	77
1950	40.4	61	32.4	56	40.6	55
1960	32.1	48	24.7	43	36.7	50
1970	26.6	40	19.8	34	32.8	45

Source: José Salvado Sampaio (1980), Portugal A Educação em Números, Lisbon, Livros Horizonte, p. 21.

Pre-Primary Education. Inhabitants and Numbers Enrolled 1975 (in thousands)			
Countries	Population	Enrolled	% 2/1 (x 100)
Bulgaria	8 761	392.6	45
Spain	35 971	956.2	27
France	52 915	2598.7	50
Holland	13 770	498.8	36
Italy	56 189	1789.0	32
Yugoslavia	21 560	210.7	10
Portugal	9 450	44.8	5
G.D.R.	16 786	671.3	40
F.R.G.	61 513	1567.4	25
Romania	21 446	812.4	38

Source: José Salvado Sampaio (1980), Portugal, A Educação em Números, Lisbon, Livros Horizonte, p. 41

Enrolment Pre-Primary (Portugal)			
Population and Enrolled (in thousands)			
1976-77			
	Population (a)	Enrolled	% 2/1
3 Years	174	17.7	10.2
4 Years	174	19.7	11.3
5 Years	179	24.5	13.7
Total	527	61.9	11.7

Source: José Salvado Sampaio (1980), Portugal, A Educação em Números, Lisbon, Livros Horizonte, p. 43

(a) Estimate

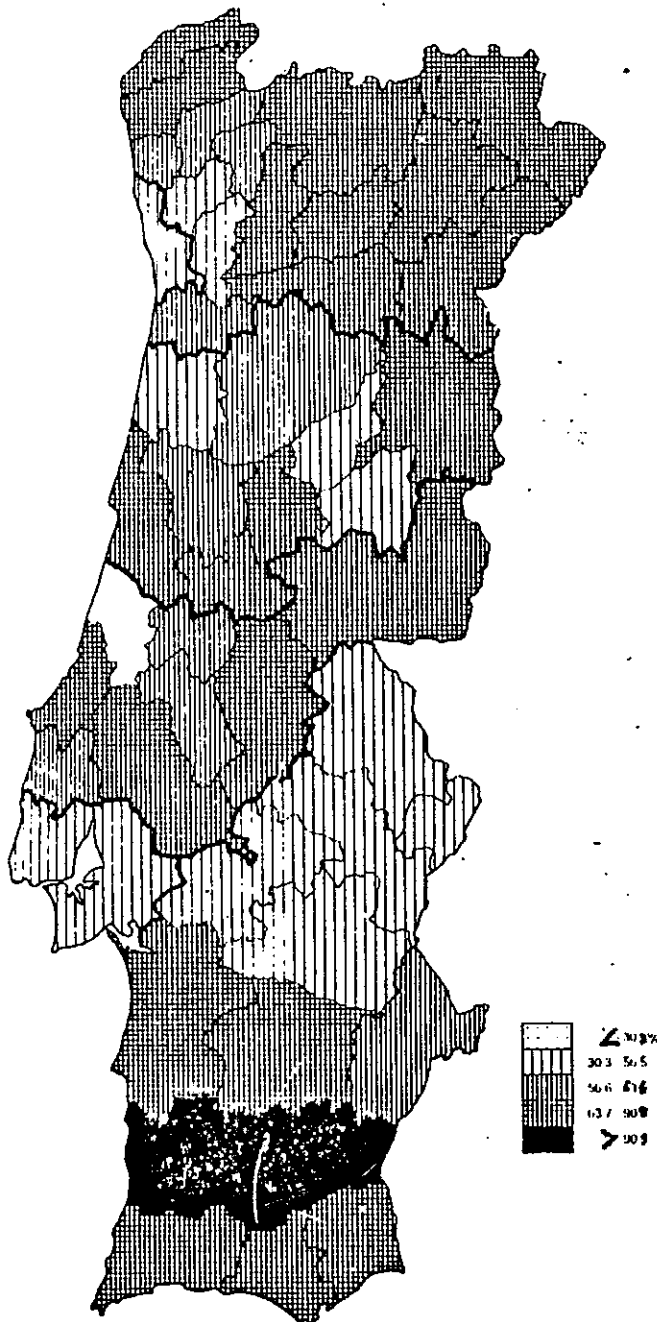
Official Primary Schooling: Pass and Failure Rates (in thousands) 1970-71 and 1976-77		
	1970-71	1976-77
1. Enrolled	878.0	856.8
2. Passed	620.1	684.6
3. % 2/1	70.6	79.9
4. Failed	247.9	172.2

Source: José Salvado Sampaio (1980), Portugal, A Educação em Números, Lisbon, Livros Horizonte, p. 48

Higher Education, Population and Enrolment 1975 (in thousands)			
Countries	Population	Enrolled	% 2/1 (x 100)
Bulgaria	8 761	128.6	14.7
Spain	35 971	540.2	15.0
France	52 915	1038.6	19.6
Greece	9 165	111.4	12.2
Holland	13 770	288.0	20.9
Italy	56 189	976.7	17.4
Yugoslavia	21 560	395.0	18.3
Portugal	9 450	79.7	8.4
G.D.R.	16 786	386.0	23.0
F.R.G.	61 513	836.0	13.6
Romania	21 446	164.6	7.2

Source: José Salvado Sampaio (1980), Portugal, A Educação em Números, Lisbon, Livros Horizonte, p. 120.

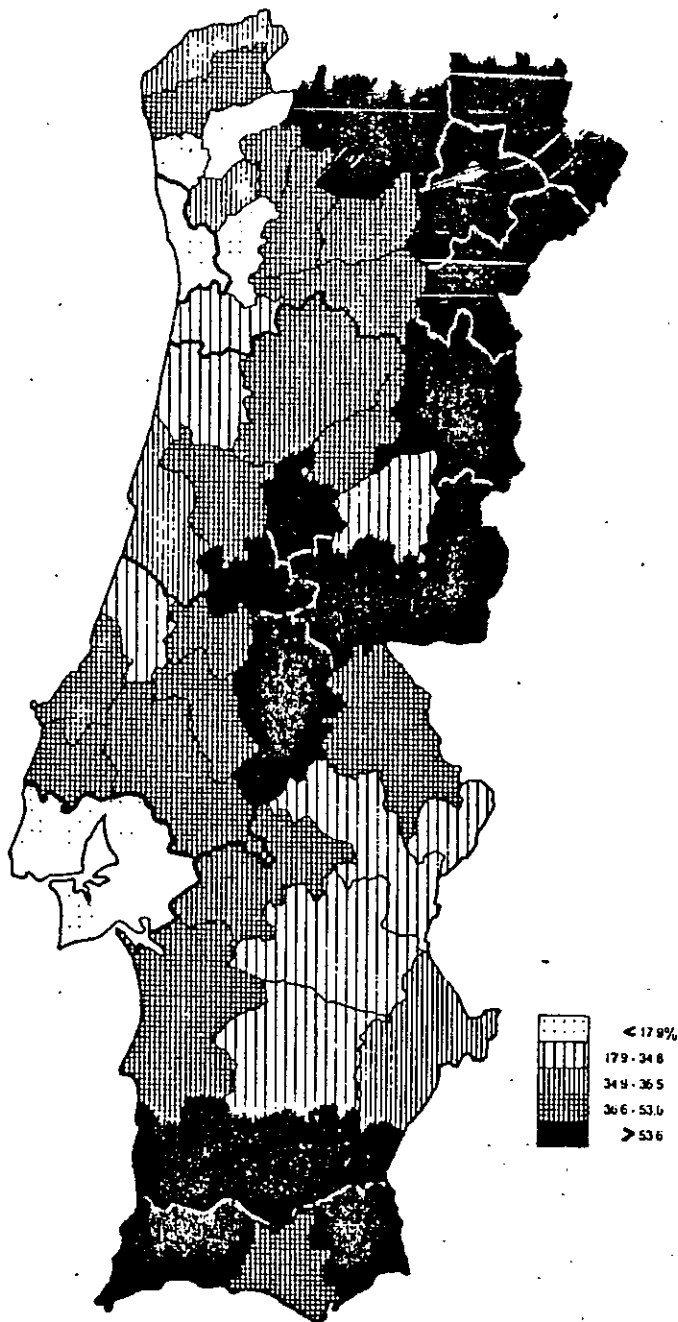
Schools Without Minimum Conditions\*



(Source: V. Quadros Martins, M. Carmo Matos, J. Marques da Silva (1981), "Construcoes Escolares: Algumas Reflexoes", in M. Silva and M.I. Tamen (eds.), Sistema de Ensino em Portugal, Lisbon: Fundacao Calouste Gulbenkian, p. 497.)

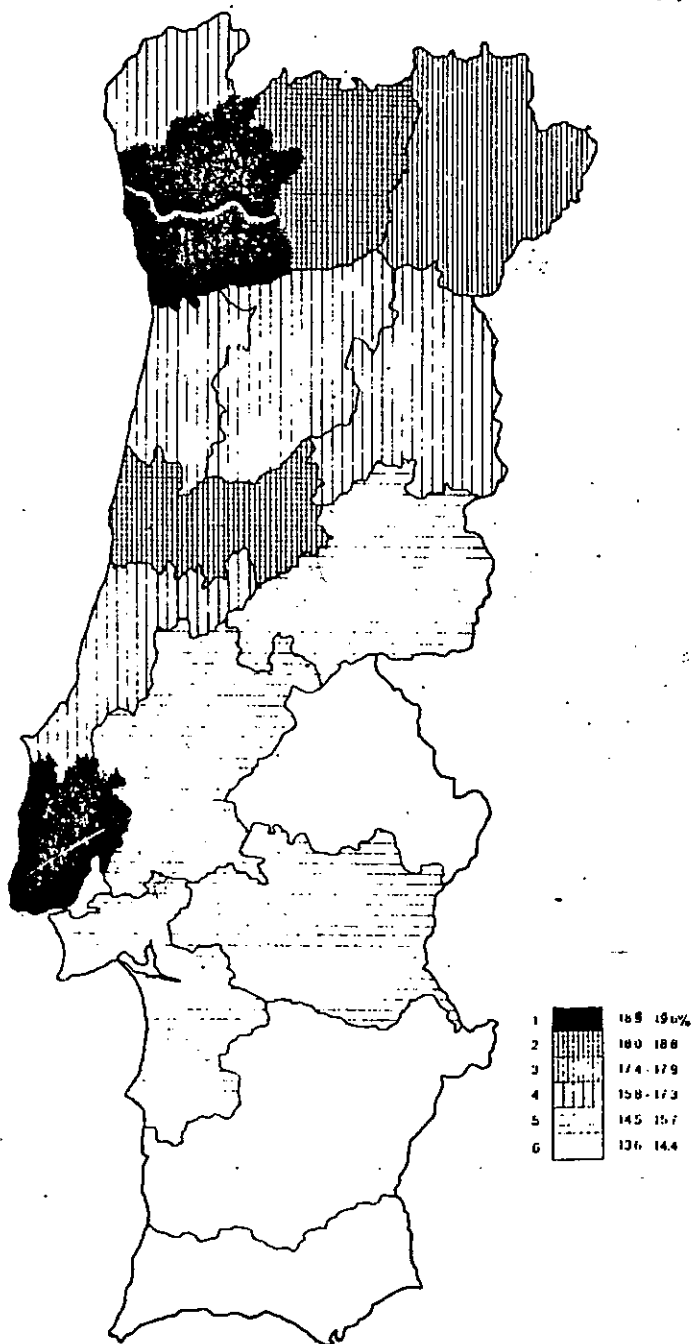
- \*  
a) bad state of conservation;  
b) inexistence or bad state of conservation of sanitary facilities;  
c) inexistence of water supply, electricity or sewage disposal.

Schools With Only One Classroom



(Source: V. Quadros Martins, M. Carmo Matos, J. Marques da Silva (1981), "Construcoes Escolares: Algumas Reflexoes", in M. Silva and M.I. Tamen (eds.), Sistema de Ensino em Portugal, Lisbon: Fundacao Calouste Gulbenkian, p. 497.)

School Enrolment Rate by District - 1970-71



(Source: Teresa Ambrósio (1981), "Democratização do Ensino", M. Silva and M. I. Tamen (eds.), Sistema de Ensino em Portugal, Lisbon: Fundação Calouste Gulbenkian, p. 585.)

Appendix II

Ministers of Education from 1970 to 1980				
Year	Minister	Govt.		Prime Minister
		(P)	(C)	
1970- 1974	José Veiga Simão	—	—	Marcello Caetano
1974 (April)	Eduardo Correia	I		* Palma-Carlos
	Vitorino M. Godinho	II		Vasco Gonçalves
	"	III		"
	Rodrigues de Carvalho	"		"
1975	Jose Emílio da Silva	IV		"
	"	V		"
	Vítor Alves	VI		Pinheiro de Azevedo
1976/ 77	Sottomayor Cardia	I		Mário Soares
	"	II		"
1978	Lloyd Braga	III		Nobre da Costa
1979	Valente de Oliveira	IV		Mota Pinto
1980	Veiga da Cunha	V		Lurdes Pintasilgo
	Vítor Crespo	VI		Sá Carneiro

Source: Adapted version of table presented  
by Mano Pacheco in O Expresso, 1 April  
1983

(P) = Provisional  
(C) = Constitutional

\* Governments post 25 April, 1974

Appendix III

School Population			
	1: 1950-51	2: 1964-65	2/1
Pre-Primary	1,954	10,350	5.2
Primary	664,750	955,331	1.4
Secondary	90,615	296,729	3.2
Lyceum	48,485	144,657	2.9
Technical	34,287	140,329	4.0
Teacher Training	2,349	3,168	1.3
Artistic	1,415	1,480	1.0
Ecclesiastic	4,079	7,095	1.7
Middle Technical	4,652	13,541	2.9
Higher	15,780	31,575	2.0
Higher Teacher Training	80	540	6.7
Special		844	
Total	868,446	1,605,639	1.8

Source: Rui Grácio (1981), "Perspectivas Futuras", Manuela Silva and M. Isabel Tamen (eds.), Sistema de Ensino em Portugal, Fundação Calouste Gulbenkian, p. 688.

Appendix IV

Calendar of events in schools and in education generally seen through the news headlines of four national Portuguese newspapers (April, May, June, 1974).

Diário de Lisboa: Daily evening newspaper, Lisbon based, Democratic Opposition = DL.

Diário de Notícias: Daily morning newspaper, Lisbon based, widest national circulation, Voice of the Regime = DN.

Jornal de Notícias: Daily morning newspaper, Oporto based, more liberal than Diário de Notícias = JN.

A República: Daily evening newspaper, Lisbon based, Democratic Opposition = R.

April:

26: DL - "University Closed Until Monday"

- "Bad Teachers Do Not Help" (round-table discussion)

JN - "Classes Interrupted in Many Schools"

27: DL - "Teachers of the Higher Technical Institute (I.S.T.) Support the Victory of the Armed Forces"

DN - Front Page - "Measures Imposed on Higher Educational Establishments Abolished"

JN - "Classes Begin Again Next Monday - in the Faculty of Letters of the University of Oporto"

28: DN - "Educational Sector Profoundly Interested in Continuation of Minister Veiga Simão"

- "Occupation of the School of the P.I.D.E. (Secret Police)"

JN - "Students' Association of the Higher Technical Institute (I.S.T.) Reopened"

- "Professor Veiga Simão and the Provisional Government"

- 29: DL - "Students of the Technical Institute Democratize Their School"
- "Students of the Higher Institute of Languages (I.S.L.A.) Meet Tonight"
  - "Students Demand the Liberation of Political Prisoners in Mozambique"
- JN - "Medical Students Reopen Their Association"
- "Present Director of the School of Arts (Belas-Arts) Must be Dismissed"
- R - "Effects of Recent National Events on the Student Movement" (setting up of school assemblies in higher education)
- 
- 30: DL - "Dismissal of the Rector of the University of Coimbra Asked For"
- DN - "Teachers and Students of Higher Education Study New Models of Operation for Their Schools"
- JN - Front Page - "Change in the Set-up of Higher Education - Towards a 'New' University"
- "Meeting of School of 'Belas-Arts' Approved Proposal"
  - "Feverish Activity in all Schools"
  - "Students' Association of Higher Institute of Economics Reopens"
  - "Suspensions in the Higher Institute of Applied Psychology (I.S.P.A.) Cancelled"
  - "Documents of the Portuguese Youth League (Mocidade Portuguesa) Burned at the 'Liceu' Gil Vicente"
- R - "General Meeting of Students of the Faculty of Sciences"
- "Teaching Staff of Higher Education Give Their Support to Junta" (dismissal of rectors and directors of higher education called for; lyceum students in meetings call for the dismissal of their school directors; two basic demands of all students: the restructuring of associative life and an end to the colonial wars)

May:

- 1: DN - "Higher Technical Institute: 1000 Students Attend Student

Meeting in Lisbon"

- JN - "Message from Lecturers of the Law Faculty of Coimbra"
  - "Students of Greater Oporto Choose New Paths"
  - "Coimbra: Meeting of Four Thousand Students"
  - "'Liceu' of Matosinhos: Demand for Dismissal of Rector"
  - "The Struggle of Secondary School Students in Lisbon"
  - "Objectives of the Study Groups of Teaching Staff"
- 2: DL - "Students Debate University Management - Coimbra"
- "Students of the Technical Institute Accuse Mass Media"
  - "Educational Policy of the 'New State' Prevented the People from Exercising its Right of Sovereignty - Secondary School Teachers"
- R - "Teachers of 'Liceu' Camões Support Junta"
- "Teachers and Students Point Out Their Needs (No to Veiga Simão; Call for an Institute of Social Sciences)"
- 3: DL - "Director of Preparatory School Dismissed by Teachers"
- "Meeting of Students of the Higher Institute of Social Services"
  - "Students of 'Belas-Artes' Expel Informers and Troublemakers"
  - "Faculty of Pharmacy: For a Truly Democratic Trade Union"
  - "Disciplinary Processes Against Students of the Faculty of Letters Cancelled"
- DN - "Faculty of Medicine in Lisbon Now Governed by a Commission of Teachers, Students and Administrative and Auxiliary Personnel"
- JN - "Foundation for Aid to Youth Organizations (FAOJ) Created"
- "Rector of 'Liceu' of Aveiro Replaced"
  - "Coimbra: Dismissal of Directors and of Rector Demanded"
  - "Law Students Say No to Veiga Simão"

- 4: DL - "School Censorship"
- DN - "Teachers and Students Occupy the Installations of the Industrial and Commercial Institute of Coimbra"
- "Teachers in Preparatory School Oppose Continuation of Veiga Simão"
- JN - "Normalization: of the Functioning of the 'Liceu' of Matosinhos"
- "Dismissal of the Director of the School Aurélia de Sousa (Industrial Secondary School)"
  - "Give Democratic Spirit to the University of Coimbra"
- R - "Need for the Restructuring of Education Say Teachers and Students"
- 
- 5: DL - "Faculty of Law: Student-Workers Meet Tomorrow Afternoon"
- DN - "Psychologists, Historians, Sociologists and Economists Call for the Dissolution of the National Junta of Education"
- "Teachers and Students of Technical School of Viseu Call for Sacking of Director"
  - "School of Nursing Calouste Gulbenkian Dismissed its Director and its Installation Commission"
- JN - "Important Meeting of the 'Liceu' of Póvoa"
- "Difficulties Created for Students and Teachers in the 'Liceu' Carolina Michaelis in Oporto"
  - "Students of the 'Infante' Try to Organize Themselves"
- 
- 6: DL - "Reorganization of the School of Painting of 'Belas-Artes' Voted For"
- "Thirty-Four Teachers of Charles Lepierre Ask the Junta 'for the Reform of Education Structures'"
- JN - "Processes Revised in the School of Preparatory Education in Godinho de Faria"
- "The Rector of the 'Liceu' António Nobre Does Not Resign"
  - "Reform of the School Council of the Science Faculty Proposed"

- 4 -
- 7: DL - "Proclamation of Students to the Portuguese People"
- DN - "Free Exchange of Ideas in All Sectors of Schooling is the Meaning of Democratic Schooling"
- "Teachers and Functionaries of Guimaraes Do Not Want Veiga Simão in the Government"
- JN - "Philosophy Students Propose the Dismissal of a Teacher"
- "Directive Council in the Teacher Training Colleges"
- "Institute for School Social Action (I.A.S.E.): Technicians and Doctors Need 'Dinamizing'"
- 8: DL - "Extinction of State Exam Demanded - Teacher Training College of Oporto"
- DN - "Orientation of the Higher Economics Institute Approved in Two Important Documents by More than Three Thousand Teachers and Students"
- "Students of Évora Against Discriminatory Powers of the Masters of the Company of Jesus"
- JN - Front Page - "Professor Rui Luís Gomes: The University of Oporto Has the Rector it Desires"
- "Directive Junta in the 'Liceu' D. Manuel II"
- "Suspension of Classes in the Higher Institute of Social Services"
- "Directive Commission in the School of 'Belas-Artes'"
- 9: DL - "Nursery School Teachers: Who Is Afraid to Move Forward?"
- "Faculty of Letters: Management Will Take Place Through a Representative Commission"
- DN - "We Need to Establish Confidence Between Students, Teachers and Functionaries"
- JN - Front Page - "Rector Expelled from University 24 Years Ago Re-enters"
- "Law Students Produce Resolutions"
- "History Will Know of the Situation in the Technical School of Santo Tirso"
- R - "The Democratization of Education"

- 10: DN - "Abolition of State Exam - Junta of National Salvation  
Petitioned"
- "Primary School Teachers of the Algarve Want to Create a  
District Trade Union"
- JN - "Braga: Position of Students of the Faculty of Philosophy"
- 11: DL - "Students Demand Trial of the PIDE Agent Who Assassinated  
José Ribeiro Santos"
- "A Petition from Teachers on Teaching Practice"
  - "Universities to Serve the People: Students of Economics"
- JN - Front Page - "University of Oporto - Directors Suggested  
for Three Faculties"
- "Faculty of Engineering Under New Regulations"
  - "School of 'Belas-Artes': Approved the Expulsion of  
Three Teachers"
  - "Aveiro: Students and Teachers Debate Their Problems"
  - "Braga: Primary School Teachers Formulate Demands"
- 12: DN - "Law Professors of the Faculty of Coimbra Refuse to  
Recognize Validity of Student Decisions"
- JN - Front Page - "Faculty of Medicine Accuses and Suspends  
Five Teachers"
- "All Hands to the Task, Now! - Teachers' Slogan"
  - "Students Ask for Cancellation of Professional Aptitude  
Exam: School of Decorative Arts Soares dos Reis"
  - "Teachers Want a Management Team in the Liceu Rainha  
Santos"
  - "Soldiers at Universities Debate Their Problems"
- 13: DL - "Foundations of Union for Teachers Launched"
- "12 or 14 Points? For Dispensation in Seventh Year?"
  - "Protest of Teachers of D. João de Castro"
- DN - "Directive and Pedagogic Commissions in the Higher School  
of Veterinary Medicine"

- JN - "Choice of School Textbooks Criticised"
- "Reintegration of Teachers in Faculty of Letters and the Expulsion of Others Demanded"
  - "Teachers of Sabrosa Formulate Demands"
- 14: DL - "Students: Side by Side with the Portuguese People"
- DN - "Professor Veiga Simão: We Should All Be Present in this Era of National Reconstruction Collaborating with the Same Loyalty and Tenacity in Total Support of the Sacred Cause"
- "Proposal for the Dismissal of the Rector of the 'Liceu' Carolina Michaelis"
- JN - "Dispensation from Exams with 10 Points: Students of Oporto Make Demands"
- "Vila Real: Primary School Teachers Formulate Demands"
- 15: DL - "Higher Institute of Economics Reopens on the 20th"
- "Grave Lack of Nursery Schools and 'Creches' in the Setúbal Area"
- JN - "Exams in Question"
- "School Veiga de Macedo: Name of School Repudiated"
  - "Guimarães: Protest by Teachers of 'Liceu'"
- R - "Student Life Returns to Normal After Intense Period of Meetings"
- 16: JN - "Extensive Activities in the Academic World"
- "Abolition of Admission Exam in Commerical Institute Demanded"
  - "New Division in the Industrial School Macedo de Castro"
  - "Teachers of Physical Education Want Total Restructuring"
  - "Aveiro: Teachers of Various Levels Desire Single Union"
- 17: DL - "Major Decisions Should Be Taken in the School Assembly (Industrial School)"

- "General Meeting of Parents and Those in Charge of Education"
  - JN - Front Page - "Science Faculty of Oporto: Neves Real is the New Director"
  - "All Faculties Already Have Directors"
  - R - "Temporary Suppression of Exams or Dispensation with a Mark of 10 Points" (Called for by students of preparatory cycle and by students of 'Liceus')
- 18: DL - "Activity of the Teachers' Trade Union Movement"
- JN - "Students of 'Soares dos Reis' and the Question of Access to 'Belas-Artes'"
  - "In the Higher Institute of Agronomy: Need for a General Council"
  - "The Status of the School and Arcos de Valdevez"
  - "Viana do Castelo: Demands Formulated by 'Liceu' Students"
  - R - "The Democratic Administration of Schools Among the Matters Dealt with Yesterday in the Council of Ministers"
- 19: DL - "Right of the Child to Education"
- JN - "Faculty of Pharmacy: Professors Ask for Inquiry"
  - "No More Absences for Pupils of Night School of Matosinhos"
- 20: DL - "Primary School Teachers of Olivais Sul: Demand Abolition of Primary School Exam"
- "Meetings of Workers and Students" (List of those meetings in the greater Lisbon area published almost daily)
  - DN - "The Commercial School Anselmo Andrade Elects a Directive Council"
  - JN - "Break Between Students and Teachers in the Escola do Magistério do Porto (Teacher Training College)"
  - "Solidarity of Students with Oppressed Peoples"
  - "The True Mission of the Teacher"

- 21: DN - "Democratic Management in the Higher Institute of Social Sciences and Overseas Politics (I.S.C.S.P.U.)"  
JN - "Anomalous Situation in the Preparatory School of Marco de Canaveres"
- 22: DN - "Resignation of Director-General of Life-Long Education Asked For"  
JN - "Faculty of Medicine Abandons Theoretical Examination"  
R - "Place Life-Long Education at the Service of the People" (functionaries demand resignation of director-general)  
- "Destroy the Classic Barriers between Teachers and Students" (Sintra 'Liceu')
- 23: DL - "New Exam Rules in Preparatory, Secondary and Technical Education"  
- "Purge Requested of School of Mass Communication"  
DN - "Review of Assessment Procedures in All Levels and Branches of Schooling" - Front Page  
JN - Front Page - "September-October Exams Without Subject Limitations"  
R - "Changing Exams Objective of First Despatch of the Minister of Education and Culture"  
- "Self-Management in the University of Lisbon Canteen"
- 24: DL - "Very Grave Situation of Schooling Requires Complete Restructuring"  
DN - "Students Decree Strike in the 'Liceus' and Schools of Lisbon until Their Demands are Met"  
- "Radical Changes in Education Processes Demanded by Installation Commissions of Teachers' Trade Union"  
R - "Lyceum Students on Strike Demand Abolition of Exams"  
- "Commission of 'Liceu' Torres Vedras Debates Problems"  
- "Meeting of Teachers and Functionaries of School no. 13 in Almada"
- 25: DL - "Let the Teachers of Musical Education Be Heard"

- "Student Canteen Under Self-Management and Open to People of the Neighbourhood"
  - "Elections to Trade Union of Teachers"
  - DN - "Student Movement Spreads Through 'Liceus', Technical Schools and Preparatory Schools"
  - JN - Front Page - "Abolition of Exams: Possibility to Be Studied"
  - "Prospects of Strike in Coimbra Law Faculty"
  - R - "Agitation in Secondary Education" (against exams)
- 26: DN - "Pupils of Private Education Demand Same Conditions as State Education"
- JN - "Strike by Secondary School Students Against Exams"
- 27: DL - "New Orientation for Experimental 3rd and 4th Years"
- "Dispensation in the 7th Year: 12 or 14 Points (out of 20)"
- JN - "Teachers and Students of Sintra 'Liceu' Ask For Purge"
- R - "Urgent Need for Levelling of Official and Private Education"
- 28: DL - "Schooling and the People: an Urgent Problem"
- "Situation of Teachers in the National Institute for Physical Education (I.N.E.F.)"
- JN - "How Will Studies Proceed in 4th Year (Experimental) of Preparatory Schools?"
- R - "Reply to the 'Defascistization' of 'Liceu' Gil Vicente"
- 29: DL - "School of Évora Says No to the Wars"
- "Pupils of 14 Technical Schools Present Demands"
  - "Purge of Education Minister Requested"
- JN - "Parents Group Disagrees with Management"

- 30: JN - "Choice of Management Bodies in School Establishments Decreed"  
- "Students in Disagreement on Final Exams - 'Liceu' Garcia de Orta"  
- "Directive Council Created for Higher Institute of Economics"  
R - Front Page - "Normalization of School Life (Ministry agrees to dispensation from exams for those with note of 9.5 or higher)"
- 31: DL - "Teachers Demand Creation of Career Structure"  
- "Teachers of School L. de Gusmão Against Director"  
DN - "Problems of Schooling at the Present Moment"  
JN - "'Orals' in Technical Schools with Teachers and Pupils - Minister Petitioned"  
- "Secondary School Students Return to Classes"

June:

- 1: DL - "Exceptional Measures for this Year's Exams"  
- "Reactionary Manoeuvres in the 'Liceu' Garcia de Orta"  
DN - "Emergency Measures in an Exceptional Situation Required for End of Year Assessment"  
JN - Front Page - "10 Points: Note of Dispensation in Preparatory and Secondary Education - Magistério Primário; State Exam Optional - University Entrance; Dispensation from Exam with Note of 12 in Nuclear Disciplines"
- 3: DN - "All Teachers Dismissed from All Benfica Day Schools"  
JN - "Towards Physical Education for the People"
- 4: DN - "Students' Association Discusses Its Future at a National Level and Coordinates Action on School Terrain in the Perspective of True Democratization"  
JN - Front Page - "A Problem Called Exams..."

- "Braga: Pupils of 'Liceu' (Girls) Said No to Strike"

5: DN - "What's Happening in Girls' 'Liceus'?"

R - "Democratization and the Responsibility of Teachers and Students"

6: JN - "School Employees Ask for Raise"

- "Primary School Teachers Ask For Abolition of This Year's Exams"

- "Education for Democracy"

7: DL - "Police Protect Reactionaries at 'Liceu' Garcia de Orta"

- "Immediate Payment of Holidays Demanded by Graduates of Schools of Physical Education"

JN - "Exams: Ministry of Education to Clear Up Doubts"

8: DL - Front Page - "No Exams for Primary School"

- "There are Students Who Are Completely Unaware of the Interests of the Popular Masses"

- "Science Faculty: Professors Continue Strike in Solidarity with Dias Agudo"

JN - "Management Process in 'Liceu' Provokes Division Among Parents"

- "Blind Students Want New Exams"

- "Management Commission in School Alexandre Mercuriano"

- "Parents' Association Formed in Leiria"

9: JN - "Directive Council of Industrial School of Espinho"

10: JN - Front Page - "Exams in Primary School"

11: DL - "Professors of I.S.T. (Higher Technical Institute)"

Support Directive Council"

- "The Question of the 'Liceu' Garcia de Orta"
  
- 12: DL - "Exams in 4th and 6th Years to Take Place"
  - R - "Teachers Disagree with Exams for 4th and 6th Years"  
(Teachers' Union against Ministerial decision to maintain exams in primary schooling at end of 4th and 6th years)
  
- 13: DL - "Law Students Demand Liberation of Saldanha Sanches"
  - "Maoist Commission in the University Canteen"
  - JN - "Accountants Ask for Return of Four-year Degree"
  - R - "Primary School Teachers of Barreiro Organize Their Union"
  
- 14: DL - "Teachers: Only Global Activity Will Be Effective"
  
- 15: DL - "Schooling, Trade Unionism and Professions"
  - "Situation of the Handicapped Child"
  
- 17: JN - "All Teachers Paid for Summer Holidays"
  - "Management Commission at 'Liceu' of Guarda"
  - R - "Primary School Teachers Demand the Urgent Arrival of the 25th of April in Their Schools"
  
- 18: DN - "Faculty of Letters: 'Administrative Pass' in All Subjects?"
  - JN - "Directive Council in Preparatory School Pires de Lima"
  - R - Front Page - "All Teachers to Be Paid Holidays"
    - "Problem of Housing to Be Discussed in Meeting at Higher Institute of Technical Education"

- 19: DL - "Paid Holidays and Right to Work for Teachers"
- DN - "Management Commission of Faculty of Medicine of Coimbra Elaborates Project of Reconstruction of Speciality Teaching"
- JN - "Seminary Students Against Their Exclusion from the New Regime of Exams"
- R - "Proposal for the Restructuring of the Institute of Economics"
- 20: DL - Front Page - "Tuesday: Primary School Exams"
- "What Sort of Teachers? What Kind of Schooling?"
- "Law Students Debate Exams"
- JN - "'Administrative Pass' for All Subjects Decided in Faculty of Letters"
- "New Methods of Pedagogy for the Future Under Study"
- 21: DL - Front Page - "The Status of the Teacher"
- JN - "Teachers Protest at Date Chosen"
- "Economic Students (Oporto) Choose Their Teachers"
- 22: DL - Front Page - "Professor Banned Entry to I.N.E.F."
- "Thirty Thousand Primary School Teachers Struggle for a New Pedagogy"
- DN - "Some Teachers, Students and Auxiliary Staff Expulsed from the Science Faculty"
- 24: DL - "Law Students Debate Question of Exams"
- DN - "In the Law Faculty: At Saturday's Meeting Majority of Students Voted for Immediate End of Exams"
- R - "Structuring of Career for Personnel of Pre-primary Education"
- 25: DL - "Transitory Suspension of Exams: Faculty of Law, Lisbon"
- DN - "Abolition of Exams Considered Incoherent and Politically"

Inopportune: Faculty of Letters, Coimbra"

- JN - "Student Programme of M.E.S.: Collaboration with Popular Initiative"
- "Democratization of Industrial School of Espinho Difficult"
- 26: DL - "Exaltation of 'Ancien Regime' Banned From Exams"
- DN - "New Professional Structure for Teachers and Researchers Proposed at Faculty of Letters, Lisbon"
- JN - "Broadening of Career Structure - Teacher Desire"
- "Coimbra: Professors with Students Except for Question of Exams"
- R - "This Year There Will Be No Passes in the Faculty of Law"
- "Country and Teachers Join Hands"
- 27: DL - "Occupation of I.N.E.F. (Higher Institute of Physical Education)"
- "Demands and Proposals of Lecturers, Investigators and Assistant Lecturers at the Faculty of Letters, Coimbra"
- R - "Schooling in the URSS Comes to Portuguese Teachers' Meeting"
- "A Strike by Teachers (at this moment) Would Lead to Division"
- 28: DN - "Students of Higher Technical Institute Suggest Democratic Organization of Their Educational Establishment"
- R - "A Career for Secondary School Teachers"
- 29: DN - "Programme of List B of Union of Teachers: Rejection of Pedagogic Authoritarianism and Recognition of Right of Students to Participate in the Running of Their Schools"
- R - "Duty of Teachers' Union to Adopt a Position on the Function that Dominant Social Bloc Wants to Impose on Teachers" (claims the programme of Popular (i.e. people's) Power in Schools).

Appendix V

Decree-Laws 221/74, 735-A/74, 806/74, 769-A/76, 781-A/76 Dealing with the Democratic Management of Schools and Universities.\*

Ministry of Education and Culture

DL 221/74 of 27 May, 1974

Considering the urgent necessity to support democratic initiatives for the establishment of management bodies truly representative of all the school community and without prejudice to other measures which may come to be taken to regularize academic life in the various levels of education,

The Provisional Government decrees, and I promulgate, as law, the following:

Article 1. While the process for the democratic selection of management bodies of school establishments with adequate participation of students, teaching staff, technical, administrative and auxiliary staff remains unregulated, the direction of these same establishments will be granted by the Ministry of Education and Culture to commissions democratically elected, or to elect, after the 25th of April, 1974.

Article 2. To the referred commissions will be allotted the tasks of former management bodies.

Article 3. The commissions will choose, from among teaching staff, a president to represent and carry out decisions collectively

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\*The translation of these Decree-Laws has aimed at capturing the essential. Thus, some details referring specifically to the organization of the Portuguese school and university have been omitted.

taken.

Article 4. The Senates, or University councils, will be replaced by commissions presided over by the rector and constituted by delegates of the commissions mentioned in the above articles.

Article 5. All doubts arising in application of the present document will be resolved by M.E.C.

Adelino da Palma Carlos, Eduardo Correia

The President of the Republic, António de Spínola

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Ministry of Education and Culture

Secretary of State for School Administration

DL no. 735-A/74 of December 21, 1974

Decree-Law no. 221/74 of 27 May, 1974, made possible the creation, just after the Movement of 25 April, of democratic structures of management in official establishments of preparatory and secondary education.\* Such structures constituted a first experience of major importance in the process of the democratization of the Portuguese school system.

The present Decree-Law, profiting from that same experience, aims at the creation of democratic structures, just referred to, in all official establishments of preparatory and secondary education, according to molds which, assuring the adequate representation of teaching staff, students and administrative and auxiliary staff, safeguard the democratic process itself and guarantee the indispensable conditions of efficiency necessary for the functioning of

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\*Preparatory Education includes the fifth and sixth years of schooling.

the schools.

In that which relates to student participation, it is necessary to take into account the important action which certainly will be the responsibility of student associations, the legal bases of which will be shortly promulgated.

The important role of parents' associations, whose creation will be supported by the Ministry, and with whom the directive councils of the schools will maintain close cooperation, in matters of common interest, is also consacrated in this Decree-Law.

The norms established via this present diploma will assume an essentially experimental character, remaining in effect only during the school year 1974-75; they will be compulsorily revised by 31 August 1975. As a result, one attributes major importance to the process of criticism which should accompany the application of these norms, criticisms which should be made in strict and permanent linkage with the most interested sectors of the school - students, teachers, those in charge of the students' education, administrative and auxiliary staff - namely, through their representative organs.

The method of payment for those carrying out directive functions foreseen in this Decree-Law, is justified according to existing criteria for remunerating teaching staff. It will, however, be revised when such criteria are altered.

In these terms,

Using the right conferred in Article 16, no. 1, 3, of the Constitutional Law no. 3/74, of 14 May, the Government decrees and I promulgate, as law, the following:

I

Managing Bodies in Official Establishments of Preparatory and Secondary Education

Article 1. The managing bodies of the official establishments of preparatory and secondary education are the following:

- a) Directive Council;
- b) Pedagogic Council;
- c) Administrative Council.

II

Directive Council

Article 2.—1. The Directive Council will be made up of representatives of teaching staff, students and administrative and auxiliary staff of the school.

2. The representation foreseen in (1) above shall be variable, in function of the number of students matriculated in the school establishment and in agreement with the following table:

Students	Reps. of Teaching Staff	Reps. of Students	Reps. Admin.	Reps. Aux.
Preparatory School (up to 1000)	4	2	1	1
for each 1000 or fraction more up to 3000	1	1	-	-
Secondary School (up to 1000)	4	4	1	1
for each 1000 or fraction more up to 3000	1	1	-	-

Article 3. The representation of teaching staff on the Directive Council will always include a teacher with complete professional

training, in establishments where there are more than ten teachers.

Article 4.---1. There will be no representation of students on the Directive Council in establishments where only the 1st and 2nd years of the normal preparatory school course functions.

2. Representatives of students on the council shall be, at least, 14 years of age.

3. In the cases where there is no representation of the student body, the council may invite students (without voting rights) to participate in certain sessions.

Article 5.---1. Not eligible for election to the Directive Council are persons who:

- a) Carried out, in 1973-74, the offices of Director, rector, sub-director or vice-rector;
- b) Were directing members of the now extinct Mocidade Portuguesa or Mocidade Portuguesa Feminina (Portuguese Youth Movements), except in cases where there was inertia of function or school service distribution;
- c) Were members of the now extinct League of Former Graduates of Mocidade Portuguesa, the National Union, the National Popular Action (both the National Union and the National Popular Action were names given to Portugal's only political party - the first under Salazar, the latter under Caetano), the Portuguese Legion, or the censor commissions, or still, servants or informers of the now extinct Direcção-Geral de Segurança, or the police forms that preceded them (DGS, formerly PIDE, was the secret police);
- d) Have publicly compromised themselves with the political regime deposed on the 25th of April;
- e) Have processes pending for motives of health, discipline

or other administrative or pedagogic irregularities;

f) Have been removed from other public offices after the 25th of April, except in the case of that foreseen in paragraph (c) of no. 1 of Article 5 of DL 277/74 of 25 June.

2. Also non-eligible for the same council are all those who are not exclusively dependent on the Ministry of Education and Culture.

Article 6.---1. The election of the representatives of the teaching staff for the Directive Council will be carried out via lists made up from all teachers in service, the latter category constituting the electoral college.

2. The electoral assembly will meet within a maximum period of 15 days starting from the effective date of this document and will be convened by the president of the managing body, or by the person in charge of the establishment, according to circular directed to all staff, at least 5 days before. The convocation, a copy of which will be sent to the Directorate-General of School Administration, will mention practical norms for the electoral process, as well as the places where the balloting process will be carried out, the hour for such, and also the places where the lists of candidates will be posted. It will then be posted, at least 5 days before the elections, in the appropriate place.

3. The period of 15 days mentioned in the first part of the number above can be altered by ministerial dispatch if it is deemed necessary (with justification) to do so.

4. Each list of candidates should be proposed by a minimum of one-tenth of the teaching staff of the school and should be initialled by all candidates making it up.

5. The lists will be delivered up to 48 hours before the opening of the electoral assembly, to the president of the managing body, or the person in charge of the establishment, who will immediately post them in the school.

6. Each list will have the right to indicate the names of up to two delegates to accompany all acts of the election.

Article 7.---1. As one of its first tasks, the electoral assembly will proceed to elect individually its electoral committee, made up of a president and two secretaries.

2. The election of the representatives of the teaching staff for the Directive Council will be by secret ballot.

3. The polls will be open for, at least, 12 hours, unless all teaching staff have voted before such period has expired.

4. The counting of the votes, by the delegates of each list and by the rest of the members of the assembly that so desire, will take place before the electoral assembly, at its convocation, all members signing the minutes.

5. The winning list must obtain more than half the votes cast.

6. If on the first ballot no list manages to win, there will be a second ballot carried out within a maximum of 2 working days, in which only the two lists most heavily voted in the first ballot can participate; the list which obtains a majority of the votes cast will be considered elected.

7. Within a maximum of 5 days after the conclusion of the electoral process, copies or notarized photocopies of the minutes of the electoral assembly shall be sent to the Directorate-General of School Administration. These documents will be accompanied by written, and signed, observations which, in the process referred to,

shall be formulated during the 48 hours following the conclusion of same.

8. The Minister of Education and Culture has the right to designate a delegate to accompany the electoral process, if he so deems, who shall act as president of the respective assembly.

Article 8.---1. The representatives of the students on the Directive Council shall be elected by an electoral college constituted by all students of the establishment.

2. The election shall take place through the creation of lists, each list being proposed by at least 1% of the student body, the minimum number of proposers being 20.

3. The referred to proposed list must be initialled by all candidates making up the list.

4. With the necessary adaptations, the rules defined in Articles 6 and 7 shall also apply to this article.

Article 9. The elections for the representatives of administrative and auxiliary staff shall take place, after necessary adjustments, in the molds established in Articles 6 and 7 for teaching staff.

Article 10.---1. By ministerial dispatch, within a period of 15 working days from the date of reception of all documentation, the validity of the elections for the Directive Council shall be declared, assuming all legal dispositions applicable have been duly followed.

2. The period foreseen in (1) above can be exceeded when the second part of no. 7 of Article 7 above has been effected.

Article 11.---1. The Directive Council will become operational within a maximum period of seven days from the date of reception of the communication in the dispatch referred to in no. 1 of Article 10.

2. The assumption of functions by the members of the Directive Council will take place via a document issued by the Court of

Expenditures (etc.).

3. and 4. deal with bureaucratic norms for taking office.

Article 12.---1. The Directive Council will elect, from among its teaching staff members, a president, whose election will be reported to the DGSA.

2. If there are no teaching staff in the establishment duly qualified, or if the Directive Council does not elect a teaching staff member in accord with these conditions, the Minister of Education and Culture can nominate a president for the Directive Council.

Article 13. The functions of the president of the Directive Council are as follows:

- a) Preside over meetings of the council;
- b) Represent the school externally;
- c) Sign documents dealing with accounts;
- d) Make decisions on all current matters or others that are delegated to him/her by the council or in situations of emergency when it is not possible to hear the latter.

Article 14.---1. The Directive Council will meet normally, during the academic year, twice a month, or extraordinarily, by initiative of its president, or by at least three of its members.

2. Extraordinary meetings of the council will be convened by the president, in writing, within a minimum period of 48 hours.

3. In case of emergency, the council can meet and can override the conditions set out above, if the president has managed to assure the presence of all members.

4. The convocation of extraordinary meetings of the council will always be accompanied by a working agenda.

Article 15.—1. During the academic year, the Directive Council can only make decisions when at least half of its members are present, two of which, at a minimum, must be teaching staff.

2. The decisions of the council will be taken by a majority of votes, the president having the deciding vote.

Article 16. The Directive Council can create the commissions or working groups it deems necessary for the treatment of specific matters, it being its duty to define the composition of such groups and the norms and mandates of functioning.

Article 17. It will be the duty of the Directive Council to carry out all the functions that, in the statutes respective to levels and branches of schooling and complementary legislation, are attributed to directors, sub-directors, rectors and vice-rectors of establishments of preparatory and secondary schooling in that which is not altered by the present document, or by ministerial dispatch, in terms of Article 41.

Article 18.—1. The members of the Directive Council will be jointly responsible for complying with legal norms and regulations in force.

2. Any members not having participated in voting acts, having abstained, or voted against such acts, are exempt from any responsibility if and when illegal decisions are taken by the council.

3. All members of the council who are minors in terms of the law will be subject to that same law.

Article 19.—1. By ministerial dispatch shall be established the number of hours, for all effects, equivalent to teaching hours which the Directive Council will distribute among its teaching staff members and, if it finds it so convenient, among those who make up

commissions or work groups as foreseen in Article 16.

2. To the Directive Council will be attributed a global gratification to be distributed among teaching, administrative and auxiliary staff members.

3. The amount of gratification referred to, and the criteria of distribution, will be defined via ministerial dispatch.

Article 20.---1. Resignation of members of the Directive Council requires acceptance by  $2/3$  of its members. There exists the right of appeal against the decision of the Directive Council directly through the Ministry.

2. In the case of a vacancy, the respective body must promote the election of a new representative.

3. When more than half the places on a representative body are vacant, new elections will be held for all members within a maximum period of a week dating from the last vacancy.

Article 21.---1. The Minister of Education and Culture will designate a person to take charge, chosen from among the teaching staff of the establishment, or from another establishment, if the validity of the election of members of the Directive Council is rejected twice in a row, or when, in moments of grave necessity, the council ceases its functions.

2. Whenever it is deemed necessary, i.e. when the circumstances justify it, persons can be nominated, by ministerial dispatch, to give support to the person nominated as foreseen in no. 1 above.

3. and 4. deal with the regulations and gratifications applicable to persons in 1. and 2. above.

Pedagogic Council

Article 22. The Pedagogic Council will be made up of representatives of the teaching staff and of the students of the establishment.

Article 23.—1. The representatives of the teaching staff and of the students on the Pedagogic Council will be regulated by Ministerial dispatch, which shall take into account the following points.

2. There will be no representation of students in establishments where only the 1st and 2nd years of the normal course of preparatory schooling take place.

3. Student representatives will be, at least, fourteen years of age.

4. The number of students shall not exceed, on any body or commission of the council, the number of teachers.

5. In cases where there is no representation of the student body, the Pedagogic Council may invite students to participate in particular sessions, without voting rights.

Article 24. The presidency of the Pedagogic Council shall belong to the president of the Directive Council, or, in his/her absence, to a teaching staff member of the Directive Council.

Article 25.—1. The Pedagogic Council shall function as a whole and in sections.

2. Disciplinary matters, which in terms of former legislation were conferred to school and disciplinary councils, shall be dealt with in a disciplinary body of the Pedagogic Council, whose members will be:

a) The president of the Pedagogic Council, who will be

president of the body;

- b) Two representatives of the teaching staff of the Pedagogic Council;
- c) Two representatives of the student members of the Pedagogic Council.

3. The president shall hold the deciding vote.

Article 26.---1. The Pedagogic Council shall meet through convocation by its president, by his/her initiative, or by at least a third of the members of the same council.

2. The disciplinary body shall meet through convocation by the president of the Pedagogic Council, as a result of the initiative of this council or the Directive Council.

Article 27. It will be the duty of the Pedagogic Council to carry out all the functions which, according to the statutes of the respective levels and branches of schooling and complementary legislation, are attributed to the school councils and the school and disciplinary councils of the establishments of preparatory and secondary education, in that which is not altered by this document, or by ministerial dispatch as foreseen in Article 41.

Article 28. If the Directive Council disagrees fundamentally with the decisions of the Pedagogic Council, it will suspend the latter's action until such time as competent central services can hear all parties and make a decision.

#### IV

#### Administrative Council

Article 29.---1. The Administrative Council will consist of a president and two seconds.

2. The president of the Administrative Council shall be the president of the Directive Council.
3. One of the seconds of the Administrative Council will be elected by the Directive Council, from among its teaching staff members.
4. The second second shall be the chief administrative officer who will act as secretary to the council's sessions.
5. The members of the Directive Council not mentioned in numbers above may participate, with right of vote, in the meetings of the Administrative Council.

Article 30.---1. The functions and day-to-day running of the Administrative Council will be regulated by DL 513/73 of 10th of October, in that which has not been altered by this document.

2. The budget of the establishment, as well as respective alterations, must be approved by the Directive Council, having been heard previously the Pedagogic Council.
3. Members of the Administrative Council shall be wholly responsible for carrying out legal norms in force.
4. All those having abstained, or having voted against any deliberations by the Administrative Council, as well as those not having participated, shall remain exempt from any responsibility for illegal decisions taken by the council.

V

General and Transitory Clauses

Article 31. Without prejudice to the contents of this document, official establishments of preparatory and secondary education shall continue subject to the superintendence of the competent central services and organs of the Ministry of Education and

Culture.

Article 32.—1. Members of the teaching staff and of the student body, as well as of administrative and auxiliary staff may meet in consultative assemblies to deal with matters of general interest to the establishment.

2. The opinions or proposals resulting from such meetings as foreseen in number 1 above do not oblige managing bodies to carry them out. The Directive Council will inform the competent central service of the Ministry of Education and Culture of the content of opinions and proposals that are not executed, as well as the reasons for such.

3. The meetings referred to above require previous authorization from the Directive Council, and they may not, except in exceptional circumstances, jeopardize school activities.

Article 33. { Deal with exception situations where headquarters of a  
Article 34. { school are not located on the school campus; where two  
Article 35. { schools are joined together; where there exist night  
                  { courses.

Article 36. School councils and school and disciplinary councils of the official establishments of preparatory and secondary education are hereby made extinct.

Article 37. The offices of secretary and of professor-secretary are hereby made extinct.

Article 38.—1. The Ministry of Education and Culture will support the creation of parents' associations in establishments of preparatory and secondary education.

2. The Directive Councils of the schools will maintain close cooperation, in matters of common interest, with the associations referred to in (1) above.

Article 39.—1. The present document will be in force, on an experimental basis, for the school year 1974-75.

2. This document will be compulsorily revised by 31 August, 1975.

Article 40. Until bodies established by this document have taken office and are operating, current managing bodies or persons shall stay in force.

Article 41. Alterations of an experimental nature, may be introduced into the statutes of preparatory, lyceum and technical professional schooling and in the complementary legislation, by way of ministerial dispatch.

Article 42. Omissions and doubts relating to this document will be resolved by ministerial dispatch.

Article 43. The present document enters into force immediately.

Seen and approved in Council of Ministers - Vasco dos Santos Gonçalves - José de Silva Lopes - Manuel Rodrigues de Carvalho.

Promulgated on the 20th of December 1974.

Published.

The President of the Republic - Francisco da Costa Gomes.

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Ministry of Education and Culture

Decree-Law no. 806/74 of 31 December, 1974

As a result of the 25th of April, authoritarian forms of government of higher educational establishments were, in spontaneous movements, substituted by an extreme variety of forms of a democratic tendency. Decree-Law no. 221/74, of the 27th of May, restricted

itself to replacing former directive bodies of the school (Director and School Council) with a directive or management commission, democratically elected, leaving for ensuing legislation definitions of electoral processes and of the remaining bodies of management of the school. Such indefiniteness, if left alone, would lead to inconveniences, so that if it may be certain that we do not wish to adopt a mere uniformity of solutions, it is also true that it is necessary to produce a certain coherence in order to guarantee the supremacy of national interest.

The time has arrived, therefore, for the institutionalization of the democratization of the establishments of higher education, profiting from that which has been valid in the diverse experiences already attempted. The intention is, then, to consolidate representative structures removing autocratic forms of direction from the school, but at the same time assuring efficiency and maximum work capacity of teachers, students and investigators. The school is a living unit of collaboration in which the indispensable division of function should not block the participation of all in a common task. And it is as an effective work place, serving the nation and accounting for its actions to the nation, that it is necessary to organize the school.

The initial project of democratic institutionalization was submitted to very wide discussion in all establishments of higher education and then reformulated so as to answer the criticisms and suggestions received.

In these terms:

Using the faculty conferred in Article 16, no. 1, 3, of the Constitutional Law no. 3/74, of the 14th of May, the Government decrees and I promulgate, to count as law, the following:

I

Managing Bodies in Establishments of Higher Education

Article 1. The managing bodies of the establishments of higher education are the following:

- a) The school assembly or assembly of representatives, in cases where the latter has been established by regulation;
- b) Directive Council;
- c) Pedagogic and Scientific Councils

II

The School Assembly\*

Article 2. The School Assembly shall be made up of teachers, non-teaching researchers, students and technical, administrative and auxiliary functionaries of the school.

Article 3. The School Assembly can delegate its powers to an Assembly of Representatives, which will represent teachers and non-teaching staff, students and functionaries. The representation of students will not exceed in number that of teachers and researchers and the number of functionaries will not exceed a number higher than a fourth of all members of the Assembly.

Article 4.--1. The election of representatives will take place according to secret ballot. Each representative body shall elect separately its representatives.

2. The election will take place during the first month of each academic year, on a date to be decided. The electoral regulation containing the norms governing the number of voters and their

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\*Portuguese higher education faculties and/or departments are referred to in these documents as "escolas" - schools.

identification shall be decided by the assembly of each body and posted at a minimum of two weeks before the event.

3. For all voting effects, graduate monitors are to be included in the assembly of teachers and non-teaching researchers and non-graduate monitors in that of the students.

4. The polls will remain open for at least two hours.

Article 5.—1. The School Assembly will be convened by the Directive Council:

- a) On its own initiative;
- b) On the initiative of the Assembly of Representatives, if it exists;
- c) On the initiative of the assembly of any of the managing bodies.

2. The convocation will be made via proclamations posted in appropriate places, at least three days beforehand, except in the case of an urgent convocation on the part of the Directive Council, for which a warning of one day is required.

3. The proclamation should give the hour, date and place of the meeting as well as the working agenda.

Article 6.—1. The tasks of the School Assembly shall be oriented by an elected committee, representing the three participant bodies, made up of a president, a vice-president and two secretaries, the latter being responsible for the minutes.

2. The minutes of the sessions will be available for consultation by any member of the assembly.

Article 7.—1. Decisions of the School Assembly are to be taken by a majority of votes expressed, each body having the right to vote.

2. The decision to exercise the right of veto must be taken in an assembly of the particular body, convened for this purpose,

carried out within a period of three days, counting the date of veto. The veto proposal shall be considered successful if it gathers two-thirds of the votes cast.

3. The veto will become definite, in any case, if the School assembly, expressly convened for the effect five days subsequent to the veto, confirms it by a majority of more than three-quarters of the votes cast.

Article 8.---1. The norms of convocation and functioning of the Assembly of Representatives are the same as those for the School Assembly, except for the following.

2. The Assembly of Representatives can be convened by the Directive Council or by a quarter of its members.

3. Decisions taken by the Assembly of Representatives cannot be vetoed.

Article 9.---1. The duties of the School Assembly or Assembly of Representatives are:

a) To establish, within the limits of the law and the plans of educational and scientific orientation established at a higher level, the general bases for the cultural, scientific and pedagogic action of the school;

b) To appreciate the annual report of the Directive Council.

2. The general bases of action of the life of the school, established in (1) above, represent the general line of orientation of the Directive Council. The Directive Council will inform the administrative, financial and pedagogic execution of such orientation.

3. Decisions not carried out must be justified.

### III

#### The Directive Council

Article 10.---1. The Directive Council will be made up of representatives of the teachers and non-teaching staff, researchers, students and functionaries.

2. The number of its members shall be established by the school assembly, without jeopardizing the criteria included in the first part of this Article, taking into account not only the dimension and complexity of the school but also demands of efficiency.

3. The representation of the students on the Directive Council will not be greater than the number of teachers and non-teaching researchers and the representation of functionaries shall not exceed a quarter part of the total number of elements on the council.

Article 11. The election of the members of the Directive Council will be carried out according to the terms defined in Article 4.

Article 12.---1. One of the members of the teaching staff on the Directive Council will be its president, who in case of emergency, shall delegate his/her functions to another member of the council.

2. It is the duty of the president of the Directive Council to preside over all sessions, represent externally the school, see that the budget is carried out and account for managing the accounts and the dispatching of current matters.

3. The sessions of the Directive Council will be recorded by the secretary who will draw up the minutes.

4. The minutes of each session must be approved at the beginning of each subsequent session.

Article 13.---1. Decisions taken by the Directive Council will be taken by majority vote, there being present at least half plus one of its members.

2. To make decisions on matters of a scientific nature, or when

exercising its duty attributed by legislation referring to doctoral examinations, the Directive Council must obtain the opinion of the Scientific Council, which must be followed unless two thirds of its members so oppose.

3. To make decisions on matters of a pedagogic nature, the Directive Council must obtain the opinion of the Pedagogic Council, and on exercising its duty regarding the recruitment of teaching staff, the Directive Council must obtain the opinion of both the Scientific and the Pedagogic Councils; these opinions can only be rejected by a two-thirds majority.

Article 14.---1. The Directive Council will normally meet periodically and in accord with a timetable adapted to the circumstances of the school.

2. Extraordinarily the Directive Council may be convened in writing and at least 48 hours in advance by its president or one-third of its members.

3. In case of emergency, the council may meet at any time as long as it is convened by all its members.

Article 15.---1. The following are the duties of the Directive Council:

- a) To decide, within the limits of the law and within the limits defined at ministerial level and by the directives of the School Assembly or the Assembly of Representatives, on all questions of interest to school life;
- b) To propose to the competent bodies solutions for matters for which it lacks authority of decision, namely for study plans, methods of assessment and hiring of new personnel;
- c) To elaborate the budget to be appreciated by the Ministry;
- d) To elaborate the management report to be presented to the

School Assembly;

- e) To constitute, having heard the Pedagogic and Scientific Councils, the permanent commissions charged with superintending the management of the library and of scientific, audio-visual and workshop equipment;
- f) To carry out disciplinary duties attributed by law to the directive bodies of the school.

Article 16. The Directive Council will be responsible in the eyes of the state for carrying out the law and regulatory norms, all its members being responsible for illegal decisions or for those decisions contrary to the principles of correct financial management which the members have not opposed.

Article 17. The Directive Council will receive a global gratification to be decided by ministerial despatch, it being the council's duty to distribute it among its members in accordance with criteria internally established.

Article 18. The mandate of the Directive Council will be for one year, its constitutive date being communicated to the Ministry.

Article 19.---1. Members may resign from the Directive Council.  
2. A member who misses two consecutive sessions or misses four sessions at different intervals, without proper justification, will lose his/her place. 3. and 4. same as nos. 2. and 3. of Article 20, DL 735-A/74.

#### IV

#### The Pedagogic and Scientific Councils

Article 20.---1. The Pedagogic Council is made up of teachers, non-teaching researchers and students, there being assured a

balanced representation among departments and, further, by delegates of the most representative bodies of the professions for which the school caters.

2. The representation of teachers and non-teaching representatives should secure the participation of the various categories existing.

3. The representation of the students should assure the participation of students from different years, the total number of students not exceeding that of teaching staff or non-teaching research members.

4. The election of the teaching and student representatives will be by secret ballot of members of bodies represented.

5. The council can function as a whole or in commissions.

Article 21.---1. It is the duty of the Pedagogic Council to make proposals and to give opinions on the following points:

- a) Study plans;
- b) Pedagogic orientation and assessment procedure;
- c) Interdepartmental coordination in the area of pedagogy;
- d) The acquisition of didactic, audio-visual and bibliographical materials of pedagogic interest.

Article 22. The Scientific Council is made up of teachers and non-teaching researchers, assuring the participation of representatives of all existing categories and departments.

Article 23. It is the duty of the Scientific Council to make proposals and to give opinions on the following points:

- a) Doctoral examinations and the nomination of respective juries;
- b) Interdepartmental coordination of the scientific area;
- c) The acquisition of scientific, bibliographical and workshop equipment.

Article 24.---1. In schools where the separation of the Scientific and Pedagogic Councils is not justified, a single Pedagogic and Scientific Council may be formed with a composition identical to that foreseen in Article 20.

2. In this case, the representatives of the students and of professional organisms will not have right of vote in the decision of questions referred to in Article 23.

V

Secretary

Article 25.---1. In each school or faculty there will be a secretary, whose category will correspond to the letter G, who shall be chosen, by proposal of the Directive Council mediated by ministerial nomination, and who shall be a graduate of any of the following: law, economics, management or administration.

2. The secretaries of the schools or faculties shall be promoted according to service commissions or contracted for periods of three years, renewable.

Article 26. The duties of the Secretary are as follows:

- a) To coordinate the services of administration;
- b) To technically assist the Directive Council;
- c) To organize and keep up to date the school's statistics;
- d) To promote, within guidelines defined by the managing bodies of the school, the conservation and proper utilization of all goods and services within the school.

VI

Final Clauses

Article 27. { Deal with specific details for annexed establish-  
Article 28. { ments.  
Article 29. }

VII

Transitory Clauses

Article 30.—1. The M.E.C. will determine, via dispatch, the limits of the period for constituting management bodies foreseen in this decree-law for the present academic year.

2. The School Assembly destined to decide the composition of the Directive, Pedagogic and Scientific Councils will be convened by the present provisional management commissions.

Article 31. To the clauses contained in this decree-law may be added other internal regulations for each particular school or department.

Article 32. Until the new management bodies have taken office the provisional management commissions will continue to function in accordance with DL no. 221/74, of 27 May.

Article 33. While legislation is not published for the regulation of the constitution of the governing bodies of the universities, the power which belonged to former governmental bodies shall be exercised by the rectors who shall constitute, with representatives of the Directive Councils of the dependent schools, university commissions, destined to aid in the coordination of the activity of the various schools and to represent the community of teachers, researchers, students and functionaries of the University.

Article 34. Any doubts over the interpretation or application

of this Decree-Law are to be resolved by ministerial dispatch.

Seen and approved in Council of Ministers - Vasco dos Santos  
Gonçalves - José da Silva Lopes - Manuel Rodrigues de Carvalho.

Promulgated on 31 December 1974.

Published.

The President of the Republic, Francisco da Costa Gomes.

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Ministry of Education and Scientific Investigation

Decree-Law no. 769-A/76 of the 23rd of October, 1976

The school has suffered during the last few years the effects of a decompression of national political life, which while producing healthy attitudes leading to the destruction of old structures, also produced the collapse of discipline indispensable to the proper functioning of any education system. In particular, the legal vacuum created by the non-observance of Decree-Law no. 735-A/74, of the 21st of December, 1974, which imposed its own revision by the 31st of August, 1975, provoked incalculable damage.

The time is right, now, taking into consideration past experience, to separate demagoguery from democracy and to launch the base of a management that, to be truly democratic, demands the attribution of responsibilities to teachers, pupils and non-teaching staff of the school community. The definition of the difference between decision-making competence and executive functions is essential for a management that protects collective interests. Still, one cannot forget that all school organization aims at providing for the achievement of pedagogic objectives, a fact which previously

was not defined and which is now considered fundamental.

In these terms:

Using the authority conferred in it by Law no. 4/76, of the 10th of September, the Government decrees, in the terms of paragraph (b) of no. 1 of Article 201 of the Constitution, the following.

I

Managing Bodies

Article 1. The bodies responsible for the functioning of each establishment of preparatory and secondary education are as follows:

- a) Directive Council;
- b) Pedagogic Council;
- c) Administrative Council.

II

Directive Council

Article 2. The Directive Council of each school establishment shall be made up of three or of five representatives of the teaching staff, depending on whether one is dealing with establishments of a thousand students or in the latter case of more than a thousand, two representatives of the pupils and a representative of non-teaching personnel, elected according to the following norms of the present decree-law.

Article 3. The representatives of teaching staff on the Directive Council shall include at least two teachers with pedagogic training, except in school establishments where there are none, a fact which

will be communicated to the respective directorate-general of education, according to the rules established in no. 4 of Article 6.

Article 4.---1. Pupils will be represented on the Directive Council of secondary school establishments that administer complementary courses.\*

2. The student body can only be represented by pupils from the complementary courses.

Article 5. In the case where pupils are not represented, the council may invite delegates, without voting rights, to participate in certain sessions.

Article 6.---1. The Directive Council will choose, from among its members, a president, a vice-president and a secretary.

2. Where Directive Councils have five members, two will be non-voting members.

3. The president and the vice-president of the Directive Council will be teachers with pedagogic training.

4. In cases where it is not possible to respect the representation rules of Article 3, the Minister of Education and Scientific Investigation, on hearing the respective directorate-general, after having heard the Director-General of Personnel and Administration, will designate the teachers that will join the Directive Council, having the right to call on qualified teachers from other educational establishments.

5. The status of the teachers referred to in the above number will be defined in the nomination dispatch.

Article 7. The election of representatives of the teaching staff

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\*With the introduction of 'unificado', complementary courses composed the 10th and 11th years of schooling (2nd cycle of secondary school).

for the Directive Council will take place from among all teachers in service in the school, all of whom form, for this effect, the electoral assembly in the terms of Article 38 of this document.

Article 8. The representatives of the pupils on the Directive Council shall be elected from all students referred to in no. 2 of Article 4 by delegates of all classes of the school, in the terms of Article 39.

Article 9. The representatives of the non-teaching personnel shall be elected from among all elements of technical, administrative and auxiliary personnel of the school, who will form an electoral assembly in the terms of Article 38.

Article 10. Refers to night school courses and student representation.

Article 11.---1. Until the rules are established for the bodies foreseen in the present document, the Directive Council will have the task, through its teaching staff members, to carry out all functions that, in the statutes of the respective degrees and branches of schooling and complementary legislation, are attributed as directive functions, and which are not altered by this present decree-law.

2. For the effects of (1) above functions shall be distributed to each of the members, who will be responsible for carrying them out.

Article 12. The Directive Council may create the commissions and work groups that it understands necessary for dealing with internal matters of the life of the school, it being its task to define the respective compositions, mandate, periods and norms of functioning, within the framework of current legislation.

Article 13. The tasks of the president of the Directive Council

are as follows:

- a) To preside over meetings of the Directive, Pedagogic and Administrative Councils;
- b) To represent the establishment;
- c) To open correspondence and sign official papers;
- d) To decide on all matters delegated to him/her by the council or in emergency situations where it is not possible for the president to hear the council;
- e) To submit to higher authority matters which exceed the competence of the Directive Council.

Article 14.---1. It is the task of the vice-president of the Directive Council to aid the president and substitute him/her in case of absence.

2. The president of the Directive Council may delegate, on a permanent basis, the right to preside over the Administrative Council to the vice-president.

3. When delegation described in (2) occurs, the Directive Council will inform the Directorate-General of Personnel and Administration and the 10th delegation of the Director-General of Public Accountability.

Article 15. The Secretary's job is to take minutes at meetings of the Directive Council, act as vice-president of the Administrative Council and carry out other functions attributed by the Directive Council.

Article 16.---1. During the school year, the Directive Council shall meet monthly.

2. Extraordinary meetings of the council shall be convened, in writing, by the president, by his/her own initiative or by that of half of the members, at least 48 hours in advance, accompanied by

a written agenda.

3. In case of emergency the council may meet within a period shorter than 48 hours if the agreement of all members of the council has been secured by the president.

Article 17.---1. The Directive Council can only make decisions if a majority of its members are present.

2. The decisions of the council will be taken by majority vote, the president having, in case of tie, the deciding vote.

Article 18. The minutes of the meetings of the council may be consulted by any member of the school establishment, except on matters considered as confidential in nature by the Directive Council.

Article 19.---1. The members of the Directive Council will be individually and collectively responsible before the state for carrying out the law and the norms in force.

2. Absent members and those not voting with resolutions taken will be free of civil, disciplinary and criminal responsibility inherent in the councils deliberations.

3. Absences will be justified, in the terms of the law.

4. The members of the Directive Council that are minors shall be subject to the regime of general law.

Article 20.---1. The Minister of Education and Scientific Investigation will determine, by dispatch, the reduction of service time that the members of the Directive Council will enjoy.

2. The council will distribute among its teaching staff members the equivalent hours of teaching determined by the dispatch referred to in the previous number.

3. Teaching staff members of the Directive Council will not be allowed extra hours of teaching unless authorized by ministerial dispatch.

Article 21. Service time given in meetings and activities of the council by non-teaching members shall see such time counted as part of their normal working day.

III

Pedagogic Council

Article 22. The Pedagogic Council shall consist of the president of the Directive Council, one teacher delegated from each group, subgroup, discipline or speciality and by pupil delegates, one from each year.

Article 23. Teacher delegates shall be elected by their respective teaching groups.

2. Delegates referred to above shall be teachers with pedagogic training, except when none are available, in which case the Directive Council shall designate same in accordance with respective councils as referred to in no. 1 of Article 25.

3. The teachers mentioned in the previous number may not be members of the Directive Council.

Article 24. The Pedagogic Council is responsible for the pedagogic orientation of the school, promoting cooperation between all members of the school, in order to guarantee an adequate level of schooling and the convenient education of the pupils.

Article 25.---1. For the exercise of its directives, the Pedagogic Council shall request the aid, namely of teachers organized in groups, subgroups, disciplines or specialities and, further, according to year and form.

2. Groups referred to in the previous number shall be presided

over by teachers elected annually from among teachers with pedagogic qualifications, except when there are none, in which case the Directive Council shall designate same in accordance with respective councils.

Article 26. It is the duty of the teachers' groups to study, propose and apply, in a coordinated manner, the most adequate solutions, as well as give an opinion and develop activities solicited by the Directive or Pedagogic Councils.

Article 27. It is the duty of teachers' groups according to year and form to give an opinion on all questions of a pedagogic and disciplinary nature.

Article 28. When the groups according to year or form meet to deal with questions of a disciplinary nature, they shall be presided over by the president of the Pedagogic Council, and shall be composed of two student representatives of the respective year or form, and, further, a representative of those responsible for the pupils' education, who will have no voting rights.

Article 29.—1. It is the duty of the teacher delegated to the Pedagogic Council from each group, subgroup, discipline or speciality to coordinate and direct the tasks of all teachers of each group, as well as the direction of the installations and take responsibility for all resources allocated to him/her.

2. In such cases as considered convenient, the Directive Council may assign responsibility for the direction of the installations to another teacher, once heard the teachers' commission for the respective discipline or disciplines.

Article 30.—1. The Pedagogic Council shall meet normally once a month during the school year, having the right, however, to

meet according to the conditions foreseen in no. 3 of Article 16.

2. The decisions of the Pedagogic Council shall be taken by majority decision, the president having the deciding vote in case of tie.

3. The members of the Pedagogic Council shall be responsible individually and collectively for all decisions taken.

4. The president of the Pedagogic Council may use the right of veto when decisions go against legal dispositions and/or the directives of the Ministry of Education and Scientific Investigation.

Article 31---1. If, in any meeting of the council, the number of pupils exceeds the number of teachers the meeting shall have no deliberative character.

2. The student members of the Pedagogic Council shall not have the right to attend meetings in which confidential matters are discussed, namely in that which may have to do with examination secrecy.

#### IV

#### Administrative Council

Article 32---1. The Administrative Council shall be made up of a president, vice-president and a secretary.

2. The functions of the president of the Administrative Council shall be carried out by the president of the Directive Council or by the vice-president, when this duty is delegated to him/her in the terms defined in no. 2 of Article 14.

3. The functions of the vice-president of the Administrative Council shall be carried out by the Secretary of the Directive Council.

4. The office of secretary will be held by the head of the

administrative and personnel office.

Article 33.---1. The duties of the Administrative Council are as follows:

- a) To establish the rules which the administration of the school should follow, in accordance with the general laws of public accountability and the orientation of the Director-General of Personnel and Administration;
- b) To approve the budget and accounts;
- c) To verify the legality of effected expenses and authorize their respective payment;
- d) To fiscalize covering of revenues and give the balance of the same to the treasury;
- e) To guard maintenance and conservation of property, promoting the organization and permanent bringing up-to-date of all registers;
- f) To accept liberalizing measures carried out in the favour of services or school establishments.

2. The liberalizing measures referred to in (f) above, when they invoke obligations for service of school establishments, require higher authorization.

Article 34.---1. The Administrative Council shall meet, at least once a month during the calendar year, all its members being present.

2. Sessions are convened by the president, at least 48 hours in advance, except in cases of emergency.

3. Sessions should be carried out without jeopardizing teaching activities.

4. Decisions shall be taken by a majority of votes, the president having the deciding vote in case of tie.

Article 35.---1. The decisions taken and opinions given by the Administrative Council shall be drawn up in the minutes.

2. Decisions taken by the Administrative Council only oblige, for all effects, those that have voted favourably, all others being exempt from civil or disciplinary responsibility.

3. Without prejudice to the above number, members of the Administrative Council shall answer collectively for the administration of the establishment.

Article 36.---1. The president of the Administrative Council can suspend the execution of any decision of the same council if he thinks it illegal or inconvenient.

2. When he/she uses this right, the president shall submit for the appreciation of the Director-General of Personnel and Administration, within the following 48 hours, the motives leading to suspension.

3. Decisions on cases referred to in the previous number shall be given within a period of 15 days counting from the date of suspension.

4. If a decision is not taken within the period stipulated, the suspension is to be withdrawn.

## V

### Elections

Article 37. All elections foreseen in the present document shall be by way of secret ballot.

Article 38.---1. The electoral assemblies foreseen in this decree-law shall be convened by the president of the Directive Council.

2. Voting instructions will mention the practical norms of the electoral process, locales of posting of candidate lists, hour and

place, or places, of balloting, which shall be posted 7 days in advance, in the customary places.

3. Teaching staff members, pupils and non-teaching staff should meet separately, and before the elections, to decide the composition of the respective commissions that will preside over the assemblies and balloting, which shall be composed of a president and two secretaries elected individually.

4. The polls shall stay open for 8 hours, unless all electors have already voted.

5. The opening of the polls shall be carried out in front of the electoral assembly, in the terms of nos. 1 and 2, minutes being drawn up that will be signed by members of the voting commission and by the rest of the members of the assembly who desire to do so.

6. The representatives of the teachers and pupils on the Directive Council shall be elected by lists.

7. The lists of the representatives of teachers must obey that established in Article 3 of this document.

8. The lists of teachers proposed for the election of representatives for the Directive Council, after being underwritten by a minimum of ten teaching staff members, must be initialled by the respective candidates, who by this means manifest their agreement.

9. The lists referred to in the previous number shall be delivered up to 48 hours before the opening of the electoral assembly to the president of the Directive Council, or to the person carrying out such function, who will immediately initial them and put them in the place mentioned in the voting instructions of that assembly.

10. The lists of student candidates shall be proposed by a minimum of ten of the delegates referred to in Article 39 and they will be

posted in accordance with the terms set out in numbers 8 and 9 above.

11. Candidates representing non-teaching staff shall be proposed by a minimum of 5 elements and such proposals shall be posted in accordance with the terms set out in numbers 8 and 9 above.

12. Each list may indicate up to two representatives to accompany all electoral acts, who will sign the minutes referred to in no. 5 of the present article.

13. The list elected is that which obtains a minimum of 51% of the votes cast, which must represent at least 60% of the total number of electors.

14. When the first ballot produces no clear winner, in the terms of number 13 of this article, there will be a second ballot, to be carried out within a maximum period of 2 working days, between the two most voted lists.

15. In the case where it is not possible to determine the winning list, a new election will be held between those lists not eliminated by number 14 above.

16. The minutes of the sessions of the electoral assembly will be sent to the Director-General of Personnel and Administration and to the respective directorate-generals of education within a period of five days after the conclusion of the electoral process. These minutes shall be accompanied by observations on the electoral process which shall be formulated during the 48 hours following the same.

17. The Minister of Education and Scientific Investigation can designate, by dispatch, a delegate to accompany the electoral act, who will assume the presidency of the respective assembly.

Article 39.---1. The form delegates shall be elected from among

and by the pupils of each respective form.

2. Form delegates shall meet in assembly to choose student representatives for the Directive and Pedagogic Councils, in accordance with Article 38.

3. It is the task of the form delegates of each year to elect their representatives to the yearly commission of the Pedagogic Council in terms of Article 28.

4. Delegates to the form commissions meeting in the terms of Article 28 shall be elected from among and by all students from each form.

Article 40. Those in charge of pupils' education shall be indicated by the respective association in accordance with Articles 37 and 43 of the present document.

Article 41.---1. By ministerial dispatch, to be forthcoming within a maximum period of 15 working days counting from the date of reception of the documentation referred to in no. 16 of Article 38, shall be declared valid the election of a Directive Council, once it is verified that applicable legal dispositions have been observed.

Article 42.---1. The Directive Council will take office in a maximum period of 7 days after the reception date of the communication of the dispatch referred to in no. 1 of Article 41.

2. Members of the Directive Council starting their functions shall be dispensed from legal formalities.

3. The taking of office of the council shall take place in a meeting of the transference of powers, convened, at least 48 hours in advance, by the president of the Directive Council.

4. Minutes will be kept of the above-mentioned meeting which will be sent to the Directorate-General of Personnel and Administration.

5. If the promulgation of the proposed Directive Council is refused twice, or if it is not constituted within the period foreseen in Article 48, that contained in no. 4 of Article 6 of this document shall apply.

Article 43. Those not eligible for election are:

- a) Persons proved to be of an electoral incapacity in accordance with the terms of Article 308 of the Constitution of the Republic;
- b) Persons who have suffered during the last three years any of the penalties foreseen in Article 11 of the Disciplinary Statute for Civil Functionaries of the state.

Article 44. Repeating students or those that are not matriculated for all subjects may not be elected to the Directive or Pedagogic Councils.

Article 45.—1. Members of the Directive Council shall continue in function for two years, except for pupils who shall be elected annually and without prejudice to the following numbers.

2. Members of the Directive Council who enter into pedagogic practice and are transferred to other educational establishments, or for whatever motive abandon their functions, shall be substituted through individual elections, respecting Articles 37 and 38.

3. When the substitution of the members of the Directive Council, except for students, goes beyond 50% of the elements which make it up, a new global election shall take place in the terms of the present document.

Article 46. Members of the Pedagogic Council shall be elected annually in the terms of the present document.

Article 47.—1. In case of extreme necessity, any member of the bodies foreseen in this document may ask for his/her resignation.

2. Such resignation will have to be accepted by the Directive Council, there always existing right of appeal to the MEIC.
3. Such resignation shall only take effect from the date of reception, by the Directive Council, of a dispatch from MEIC recognizing such resignation.
4. The replacement and confirmation of any of the members of the bodies foreseen in this document shall be made according to that contained in Articles 38 and 39.

Article 48.---1. Elections of teaching and non-teaching staff shall take place between the 1st and the 15th of October.

2. Elections of the representatives of students shall take place by the 30th of October.

Article 49.---1. The different posts foreseen in this document must be accepted.

2. In exceptional cases, however, duly justified, the bodies who hold responsibility for choosing the elements for different posts may accept reasons for refusal to carry out the same.

Articles 50 and 51 deal with minor bureaucratic details.

Article 52. The Directive Council of school establishments shall maintain direct contacts of cooperation with student and parent associations.

## VI

### Final and Transitory Clauses

Article 53. deals with minor bureaucratic details.

Article 54. The Minister of Education and Scientific Investigation can, in the case of grave infraction of legal dispositions, dissolve the Directive Council and nominate his/her own representative who

will remain in office until the election of a new Directive Council in accordance with this document.

Articles 55, 56, 57, 58, and 59 deal with minor bureaucratic details.

Seen and approved in Council of Ministers - Mário Soares -  
Mário Augusto Sottomayer Leal, Cardia.

Promulgated on the 18th of October, 1976.

Published.

The President of the Republic, António Ramalho Eanes.

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Ministry of Education  
and Scientific Investigation

DL no. 781-A/76  
of 28 October 1976

The attempt to install democratic management of higher educational establishments that was proposed in DL 806/74, of the 31st December, 1974, did not manage, in practice, to concretize its objectives. Its dispositions were too vague. They gave legal cover to demagoguery and to the supremacy of activist minorities which, through manipulation and coercion, managed to effectively dominate a large part of the schools of higher education with negative effects on administrative and financial management, on ideological pluralism basic to the democratic school, on the quality of schooling, on necessary pedagogic renovation and the correct insertion of higher education in the cultural and socio-economic context of the country.

It is necessary, therefore, to correct, with urgency, the

current system of management of schools of higher education and install, finally, internal democratic organization and functioning in these educational establishments.

Three central preoccupations guided the elaboration of this present document: to institute effective democracy in the schools, so that the climate of these schools cannot be adjusted to medieval or corporatist schemes, even when of an anarcho-populist variety; to promote quality, scientific and pedagogic, giving adequate responsibility to he/she who is competent; to establish in each school structures that guarantee the correct use of budget allowances from the state destined for higher education.

Compared with regimes practiced in other countries, from diverse political and social quadrants, the document hereby published is, without doubt, the most daring and progressive, conjugating democracy with responsibility as is proper for a society governed by the principle of democratic socialism, where all elected organs must account for their actions.

In these terms:

The Government, in accordance with legislation conceded in line (d) of Article 2 of the law 4/76 of 10 September, decrees and I promulgate:

Article 1. The internal bodies of establishments of higher education shall be the following:

- a) General Assembly of the school;
- b) Assembly of Representatives;
- c) Directive Council;
- d) Pedagogic Council;

- e) Scientific Council;
- f) Disciplinary Council.

## Chapter I

### General Assembly of the School

Article 2. The General Assembly of the school is made up of teachers, non-teaching researchers, students and administrative, auxiliary and technical personnel.

Article 3. The duties of the General Assembly are as follows:

- a) To appreciate the general lines of school orientation;
- b) To appreciate the activity of the Assembly of Representatives and the Directive Council;
- c) To appreciate the report of the Directive Council in reference to the current year and to the budget plan and activities for the following year;
- d) To appreciate relevant problems for teaching and for youth in general and other activities of general interest from an academic point of view.

Article 4.---1. The General Assembly of the school shall have ordinary and extraordinary meetings, whose functioning shall be guided by rules approved by the assembly.

2. There shall take place annually three meetings of the assembly: in the month of January to appreciate and discuss the report referent to the previous year; in the month of May, to appreciate and discuss the budget plan and activities for the following year; and in the month of November, for the election of the commission of the General Assembly of the school, also to approve or alter

rules and to appreciate matters of a general nature that interest the school.

3. The General School Assembly shall meet extraordinarily:

a) On the request of, at least, 10% of its members;

b) Through convocation by the president of the commission of the School Assembly to accept the resignation of the majority of its members and to proceed to new elections;

4. The request referred to above must be sent to the president of the commission and will correctly identify its supporters.

Article 5.---1. Ordinary meetings will be convened with a minimum warning of eight days; for extraordinary meetings, the period is 48 hours.

2. The bulletin covering the meeting shall be posted with hour, locale and matters to be discussed and shall always be signed by the president, or, if unavailable, by the vice-president.

3. Bulletins should be given good coverage, and should be posted in places clearly visible within the school.

Article 6.---1. The commission of the General Assembly of the school shall be composed of a president, a vice-president, who will substitute for the president, 2 secretaries and 2 seconds, in charge of counting votes, who will be able to substitute the secretaries if necessary.

2. If the majority of its members are absent, the president of the commission shall choose, from among the elements present at the assembly, those necessary to help him direct the proceedings.

3. The jurisdiction of the commission of the General Assembly shall be determined in the rules for voting.

Chapter II

The Assembly of Representatives

Article 7. The Assembly of Representatives shall be composed of delegates of the teaching staff, student body, and technical, administrative and auxiliary staff, elected for one year, its composition being established in the following manner:

- a) In schools with less than 2000 students: 20 representatives of teaching staff, 20 student representatives and 10 of technical, administrative and auxiliary staff;
- b) In schools with 2000 students or more: 30 representatives of teaching staff, 30 student representatives and 15 of technical administrative and auxiliary staff.

Article 8. It is the task of the Assembly of Representatives:

- a) To elect the Directive Council and to dismiss it;
- b) To approve the report of the Directive Council for the past year, to approve the budget plan and to approve activities for the coming year;
- c) To survey generally all acts of the Directive Council, with the exception of the effective area of jurisdiction of this council;
- d) To elect the Disciplinary Council.

Article 9. The members of the Assembly of Representatives shall be directly elected by each respective body according to the system of proportional representation of competing lists, by secret ballot in the terms of Articles 38 and 39.

Article 10.—1. The Assembly of Representatives shall meet normally every two months except for extraordinary meetings.

2. Extraordinary meetings can be called by a request from one quarter of its members, through presidential initiative or by request from the Directive Council.

3. Extraordinary meetings cannot be convened without notice of less than 48 hours and without advising all members with indication of the agenda.

Article 11.---1. The commission of the Assembly of Representatives shall be composed of a president, a vice-president and two secretaries elected by simple majority from competing lists, it being obligatory that the president be a member of the teaching staff.

2. The president's tasks shall be to establish contact with the Directive Council, to preside over meetings, to sign the minutes and to communicate to the Ministry the constitution of the Directive Council.

3. The secretaries will take the minutes and make sure they are posted in the appropriate place.

Article 12.---1. Decisions taken by the Assembly of Representatives will only be valid when a majority of its members are present.

2. Decisions shall be taken by a majority of votes of the members present, except for the act of dismissal of the Directive Council, which will have to be documented and will require the approval of two-thirds of all members.

Article 13.---1. The mandate of the members of the Assembly of Representatives is for the period of one year and only ends with the taking of office by new members.

2. Members will lose their mandate if:

- a) They are permanently unable to carry out their functions;
- b) They miss more than two consecutive meetings, or three

alternate meetings, unless the assembly accepts as justifiable the motive indicated for such absence;

- c) They are found guilty in a disciplinary process, during the year of mandate.

3. The members of the Assembly of Representatives that are elected to the Directive Council conserve their membership of the Assembly of Representatives, unless they purposely renounce such membership.

Article 14.---1. The members of the Assembly of Representatives are able to renounce their mandate.

2. Vacancies appearing in the Assembly of Representatives, through loss of mandate or by a renunciation of mandate, shall be filled by the elements who appear next on the list and in the order indicated; in the absence of these, there shall be new elections for the respective body, as long as the vacancies occurring reach more than half the body.

3. The newly elected members in the terms of the previous number shall only complete the mandate of those they are replacing.

### Chapter III

#### The Directive Council

Article 15.---1. The Directive Council shall be composed of four teaching staff members, four students and two elements from the technical, administrative and auxiliary staff, elected by secret ballot by the respective bodies of the Assembly of Representatives in the terms of Article 51, and from among all elements of the school.

2. The composition of the Directive Council can be reduced by 50%, maintaining the proportional representation of each body, when the Assembly of Representatives finds it convenient to do so.

3. The representatives of teaching staff referred to in number (1) should include two professors, one of whom must be either a 'catedratic' professor or an 'extraordinary' professor;\* as far as the possibility arising in number (2) above is concerned, the representatives of the teaching staff must also include either a 'catedratic' or an 'extraordinary' professor.

Article 16. The tasks of the Directive Council are:

- a) To administer and direct the school in all matters which are not the express concern of other managing bodies, assuring their regular functioning;
- b) To carry out all acts emanating from other bodies of the school, it not being permissible to delay the processing of matters presented to it;
- c) To advise the rectories of the universities and the Ministry of Education and Scientific Investigation of all matters considered important or grave to the functioning of the school, especially when they might prejudice the proper functioning of school work or the quality of the teaching ministered;
- d) To collaborate directly with university authorities and with MEIC in all questions of interest to the school, or to higher education, when such collaboration is solicited;
- e) To elaborate, by the 30th of April, a plan for the budget and for other activities, that should be presented, within 15 days, to the competent authorities, after review by the Assembly of Representatives and the General Assembly of the School;

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\*There are three categories of 'professor' in Portuguese universities: (in order of rank) 'catedrático'; 'extraordinário' (now 'associado'); and 'auxiliar'. Lecturers are called 'assistentes'.

- f) To present, by the 15th of January, the report of the past year's activities to the Assembly of Representatives and to the General School Assembly;
- g) To guarantee the realization of elections for the Assembly of Representatives and the Pedagogic Council within the time limits established in this document;
- h) To post the date of the election to the Assembly of Representatives and to the Pedagogic Council and to verify the correctness of the candidature lists presented.

- Article 17.---1. The Directive Council must be presided over by a teaching staff member, elected by the same council.
2. The president is responsible for conducting the meetings of the Directive Council and for carrying out the functions of this council, also for the normal dispatch of official documents (safeguarding the right to determine cases of urgency), all decisions taken being submitted to the council for ratification. In council decision-making the president shall have the deciding vote.
3. The president is to represent the school in all public acts.
4. The president of the Directive Council can invite, without right of vote, the presidents of the Pedagogic and Scientific Councils in order to assure the necessary link between the respective bodies, and also other persons that the Directive Council finds suitable.
5. The president of the Directive Council shall have the right to a monthly gratification to be posted by dispatch from the Ministers of Internal Administration, Finances and Education and Scientific Investigation.
6. The Secretary of the school, or, if incapacitated, an element of the administrative personnel, will assist the meetings of the

Directive Council, without right of vote, being it his/her duty to take the minutes which shall be signed by all members present.

Article 18.---1. The Directive Council shall meet fortnightly except during the holiday periods, and except for extraordinary meetings when they are considered necessary by the president, by the representatives of any of the other managing bodies, or by request from the Assembly of Representatives.

2. All members of this council shall be advised personally of the realization of extraordinary meetings and of the agenda for such meetings.

Article 19.---1. The length of the mandate of the members of the Directive Council shall be for one year which shall only end with the taking of office by newly elected members.

2. Members of the Directive Council lose their mandates:

- a) In the case of dismissal by the Assembly of Representatives ;
- b) When they directly renounce the exercise of such functions, this having been accepted by the council;
- c) When they have been absent from three consecutive, or from five alternate, meetings, unless the council finds justifiable the excuse presented;
- d) In the case of permanent indisposition, this having been appreciated by the council;
- e) When they have been found guilty in disciplinary processes during the year of mandate.

3. Vacancies arising on the Directive Council by way of that disclosed in the previous number shall be filled, through individual elections, by the Assembly of Representatives, in the terms of the electoral process set out in this document.

Chapter IV

The Pedagogic Council

Article 20.---1. The Pedagogic Council shall be composed of professors, lecturers and students, in equal numbers, in a number not to exceed 24, elected by the members of each category, by secret ballot, in the terms set out in Article 52.

2. In schools in which there is only one course, the Pedagogic Council shall be represented by two members of each of these categories.

3. In schools in which there are two or three courses, each shall be represented by two members of each of these categories.

4. In schools in which there are more than three courses, each shall be represented by one member of each category.

5. The professor heading the winning list shall carry out the functions of president, his/her tasks being to preside over meetings and sign the minutes, he/she holding the deciding vote.

6. Vacancies occurring on the Pedagogic Council shall be filled in the terms set out in no. (2) of Article 14.

Article 21. It is the task of the Pedagogic Council:

- a) To propose suggestions and give opinions on matters of pedagogic orientation and on teaching methods used in the school;
- b) To propose the acquisition of didactic, audio-visual or bibliographical material of pedagogic interest and to give opinions on proposals relating to this material;
- c) To organize, in collaboration with the Directive and Scientific Councils, conferences, seminars and study groups of didactic or scientific interest to the school;

- d) To designate a professor to take charge of the school's library.

Article 22.---1. The Pedagogic Council can function in meetings which include all its members, or it can function in groups, these being organized according to the structure of the courses existing in the school.

2. Decisions taken in group meetings will be subject to ratification by the whole council.

3. The council itself will meet normally, at least, once a quarter and will have power of decision as long as half its members and its president (or his appointed substitute) are present.

Article 23. The mandate of the members of the Pedagogic Council shall last one year and cease as a result of permanent indisposition, or in the case of three consecutive non-justifiable absences, or five non-justifiable alternate absences.

## Chapter V

### The Scientific Council

Article 24.---1. The Scientific Council shall be composed of 'catedratic', 'extraordinary' and 'auxiliary' professors, as well as those 'acting professors' recognized as such in DL 769-B/76 of the 23rd of October.

2. The Scientific Council shall meet as a whole, as a coordinating commission, and at times shall function in groups according to the structure of the school in question.

3. All professors operating in groups shall have a seat on the council.

4. In schools where there are more than 24 professors who meet

the conditions set out in number (1) above, there shall be created a coordinating commission, for which there must be elected up to 24 professors, assuring, as far as possible, an equitable representation of the groups existing in the school.

5. Each group shall elect its representatives to the coordinating commission in the terms set out in Article 51, no. (3).

6. Decisions taken by groups will be subject to ratification by the coordinating commission or by the council as a whole in schools where there does not exist a coordinating commission.

7. In schools where a coordinating commission functions the council meeting shall act as an opportunity for appeal.

8. Members of the council will elect from among themselves a president, who shall conduct meetings and represent officially the council and who shall also preside over the coordinating commission when such exists.

Article 25.---1. The tasks of the Scientific Council are as follows:

a) To declare itself on the suitability for admission of candidates to the examination of 'Doutoramento\*', in conformity with legal guidelines;

b) To establish and organize such examination, in legal terms, and propose names for respective 'juries' (panels);

c) To open processes leading to the filling of vacancies for tenured staff and to arrange interview panels for such processes;

d) To organize the 'jury' (panel) for examination leading to a tenured position;

e) To propose final nomination of 'catedratic' and 'extraordinary' professors and of the continuation of 'auxiliary' professors;

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\*Equivalent, approximately, to the English Ph.D.

f) To propose the contracting of teaching staff, researchers and technical personnel linked to scientific activities, as well as the renovation of contracts;

g) To propose the final appointment of researchers and technical personnel linked to scientific activities;

h) To make suggestions and give opinions on the organization of plans for study, as well as on the distribution of teaching staff, and to ratify such plans and distribution;

i) To make suggestions on the development of activities of scientific investigation, and on cultural activities or those activities lending service to the community;

j) To make suggestions on the acquisition of scientific and bibliographical materials and on their use.

2. In that which refers to paragraphs c), d), e), and f) of number (1), voting rights are restricted to those who have an equal or superior category to the candidates in question.

Article 26. In schools of higher education that are not integrated in the university system, the composition of the Scientific Council shall be regulated by dispatch from the MEIC.

## Chapter VI

### The Disciplinary Council

Article 27.—1. The Disciplinary Council is to be made up of two teaching staff members, two students and an element from the technical, administrative and auxiliary personnel, elected by the Assembly of Representatives, by secret ballot, in the terms set out in no. (4) of Article 51.

2. The representatives of each body shall be elected by the

members of the corresponding body of the Assembly of Representatives, it being necessary, for the election to be declared valid, the presence of a majority of the members of each body.

3. When present members of the Assembly of Representatives are elected, these will also accumulate positions on the Disciplinary Council, unless they opt for membership only of the latter, in which case they shall be replaced on the Assembly of Representatives.

Article 28. A special law will regulate the responsibilities and functioning of the Disciplinary Council and the organization of a disciplinary process.

## Chapter VII

### General and Common Clauses

Articles 29, 30 and 31 deal with specific organizational details.

Article 32.---1. Teaching staff and technical, administrative and auxiliary staff are subject to the rules applicable to public administration in that which concerns absence from meetings in which they must participate with the exception of the General School Assembly.

2. For this effect, meetings must take place during working hours and attendance at meetings takes preference over all other educational activities, with the exception of examinations and examination panels.

Article 33. The Directive, Pedagogic, Scientific and Disciplinary Councils, as well as the commissions of the Pedagogic and Scientific Councils, shall only take decisions when a majority of their members are present; decisions must be approved by a majority of the votes

cast.

Article 34. All decisions that refer individually to persons shall be taken by secret ballot.

Article 35. Null and void are decisions taken by any of the bodies proposed by this document when

- a) They refer to matters outside their jurisdiction;
- b) Those meetings at which they were taken were not convened according to regulations;
- c) They refer to matters foreign to the agenda of the meeting;
- d) They are in violation of this document or of other legislation in force.

#### Chapter VIII

##### The Electoral Process

Articles 36 to 56 deal with the details of the electoral process. Although more elaborate than the same process described in DL 769-A/76, the process is basically the same.

#### Chapter IX

##### Final and Transitory Clauses

Articles 57, 58 and 59 refer to organizational matters having to do with the specificities of the Portuguese higher education system.

Article 60.—1. The appointment of rectors will continue to take place according to DL no. 26611 of the 19th of May 1936, until such time as a new legal document concerning the organization and functioning of the universities has been drawn up.

2. The Government may, in the meantime, define a new regime for such appointments.

Article 61.---1. As long as the new legal document referred to in no. (1) of the previous article does not appear, powers pertaining to managing bodies of the universities, up to the 27th of May, 1974, shall be exercised by the rectors, who may constitute, from among elements of the Directive Councils of schools dependent on them, councils destined to aid the internal coordination of the activities of the various schools.

2. Rectors may also institute councils destined to aid them in pedagogic, scientific or cultural matters. These councils shall function as a whole or in commissions and may invite specialists to aid them in the carrying out of their duties.

Article 62. Any doubts arising in the interpretation or application of this Decree-Law shall be resolved through ministerial dispatch.

Article 63. DL 806/74, of the 31st of December, is hereby revoked.

Article 64. The present Decree-Law comes into force on the date of its publication.

Seen and approved in Council of Ministers - Mário Soares -  
Mário Augusto Sottomayor Leal Cardia.

Promulgated on the 26th of October, 1976.

Published.

The President of the Republic, António Ramalho Eanes.

Appendix VI

Education and the Portuguese Constitution of 1976

Fundamental Principles:

Article 1 - 'Portugal is a sovereign Republic based on the dignity of the human person and the will of the people and committed to its own transformation into a classless society.'

Article 2 - 'The Portuguese Republic is a democratic state based on the sovereignty of the people, on respect for and the safeguarding of fundamental rights and freedoms and on plurality of democratic expression and democratic political organization, whose object is to ensure the transition to socialism by creating the conditions for democratic exercise of power by the working classes.'

Article 9 - 'The basic tasks of the state shall be:

- a) To safeguard national independence and create the political, economic, social and cultural conditions conducive to it;
- b) To secure organized participation by the people in the solving of national problems, to defend political democracy and to ensure respect for democratic legality;
- c) To socialize the means of production and wealth, in forms appropriate to the characteristics of the present period of history, to create conditions permitting the promotion of the people's welfare and quality of life, especially those of the working classes, and to abolish exploitation and oppression

of man by man.'

Economic, Social and Cultural Rights and Duties:

Article 73 - '1. Everyone shall have the right to education and culture.

2. The state shall promote the demarcation of education and conditions in which education at school and by other methods can contribute to development of the personality and the advance of a democratic and socialist society.

3. The state shall promote the democratization of culture by encouraging and securing access by all citizens, particularly the workers, to the enjoyment of culture and cultural creation through local people's organizations, cultural and recreational associations, means of public information and other appropriate channels.'

Article 74 - '1. The state shall recognize and safeguard the right of all citizens to education and to equality of opportunity in schooling.

2. The state shall reform education so as to eliminate its function of perpetuating the social division in labour relations.

3. In the implementation of its education policy it shall be the duty of the state to:

- a) ensure compulsory and free universal basic education;
- b) institute a public system of pre-school education;

- c) ensure permanent education and abolish illiteracy;
- d) secure to all citizens, in accordance with their ability, access to the highest levels of education, scientific research and artistic creation;
- e) institute by stages free education at all levels;
- f) co-ordinate education with productive and social activities;
- g) promote the training of scientific and technical staff of working-class origins.'

Article 75 - '1. The state shall establish a network of official education institutions to meet the needs of the whole population.

2. The state shall supervise private education which is complementary to public education.'

Article 76 - 'Entry to the university shall have regard to the needs of the country in qualified staff. Entry by workers and young people from the working classes shall be encouraged.'

Article 77 - '1. Scientific creation and research shall be encouraged and protected by the state.

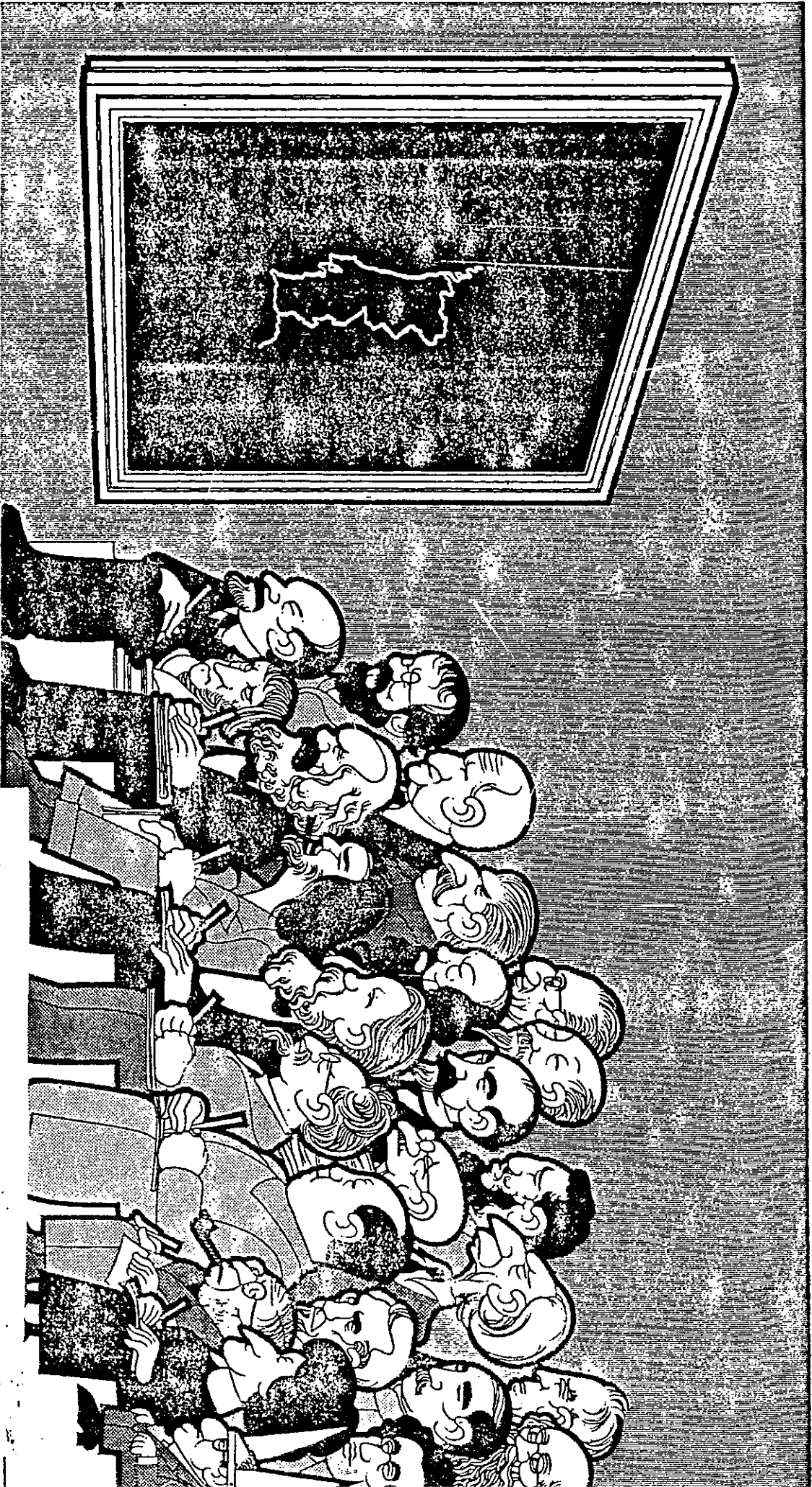
2. Scientific and technological policy shall aim at promoting fundamental and applied research, preference being given to fields relevant to the development of the country, with a view to its progressive liberation from foreign dependence and with due regard to co-operation and interchange with all peoples.'

Article 78 - 'The state shall preserve, defend and enhance the cultural heritage of the Portuguese people.'

Article 79 - 'The state shall recognise the right of citizens to physical culture and sport as a means of human self-fulfilment and shall promote, stimulate and guide their practice and their extension.'

Economic Organization

Article 80 - 'The economic and social organization of the Portuguese Republic shall be based on the development of socialist relations of production through collectivisation of the principal means of production, land, and natural resources and through the exercise of democratic power by the working classes.'

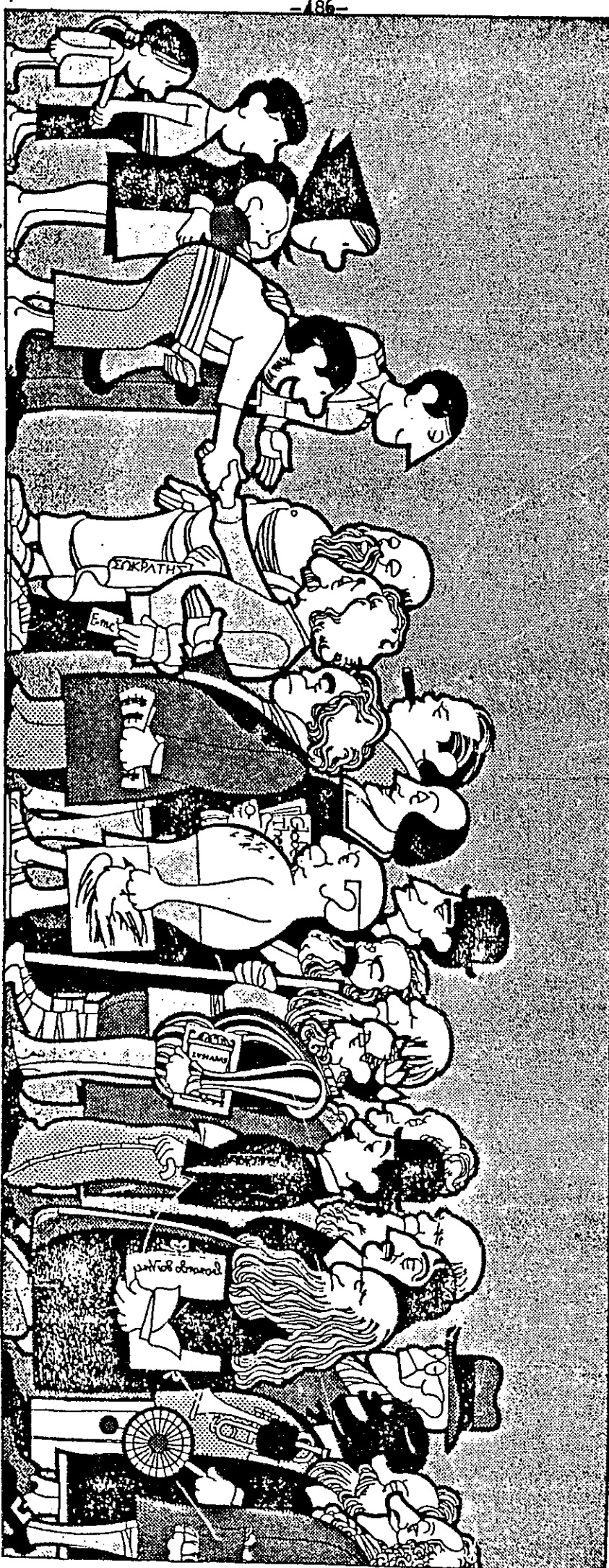


UM PROBLEMA DIFÍCIL

'A Difficult Problem'

(Source: Joao Abel Manta (1975), Cartoons: 1969-1975, Lisbon: Edicoes 'O Journal')

M.F.A. Campanha de dinamização cultural



multo prazer em conhecer vobiscos

'Very Pleased to Meet Your Excellencies'

(Source: Joao Abel Manta (1975), Cartoons:  
1969-1975, Lisbon: Edicoes 'O  
Journal')

Appendix VIII

Statement of MES Teachers' Group\*  
(attitude to 'Serviço Cívico Estudantil')

It is now necessary to give a clear answer to the Ministry of Education and Culture and to the Government. It is not that the students are refusing to go on being locked up in their academic institutions, separated from society. But they reject the Serviço Cívico, which they see as a selective and rationalized measure imposed by the bourgeois university. We refuse this service, not because we want to remain a privileged caste, beneficiaries of the system of exploitation, but because we refuse to oppose the objective interests of the working class. We refuse to set new elites and to help restructure the universities in capitalist terms. We believe that the relationship between study and practice must be programmed and carried out by all students from the first to the fifth year (and not programmed in the cabinets and imposed on first year students).

The struggle of the students is a struggle against a reactionary system of learning. It is a struggle aimed at transforming, radically and progressively, this whole pattern of education. We wouldn't refuse to leave the schools if the exit was controlled and decided by us, if it was undertaken in a spirit of permanent contact with the workers in a real situation, with their struggles and with their autonomous organizations. It is true that it is only by putting students in contact with the concrete problems which confront the working class that they can understand the workers' real problems.

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\*M.E.S. = Movimento da Esquerda Socialista (Movement of the Socialist Left)

But it is also true that it is only through scientific reflection on these problems that such contacts can produce meaningful results: on the one hand a knowledge of reality and on the other a conscious support for the workers' struggle for emancipation.

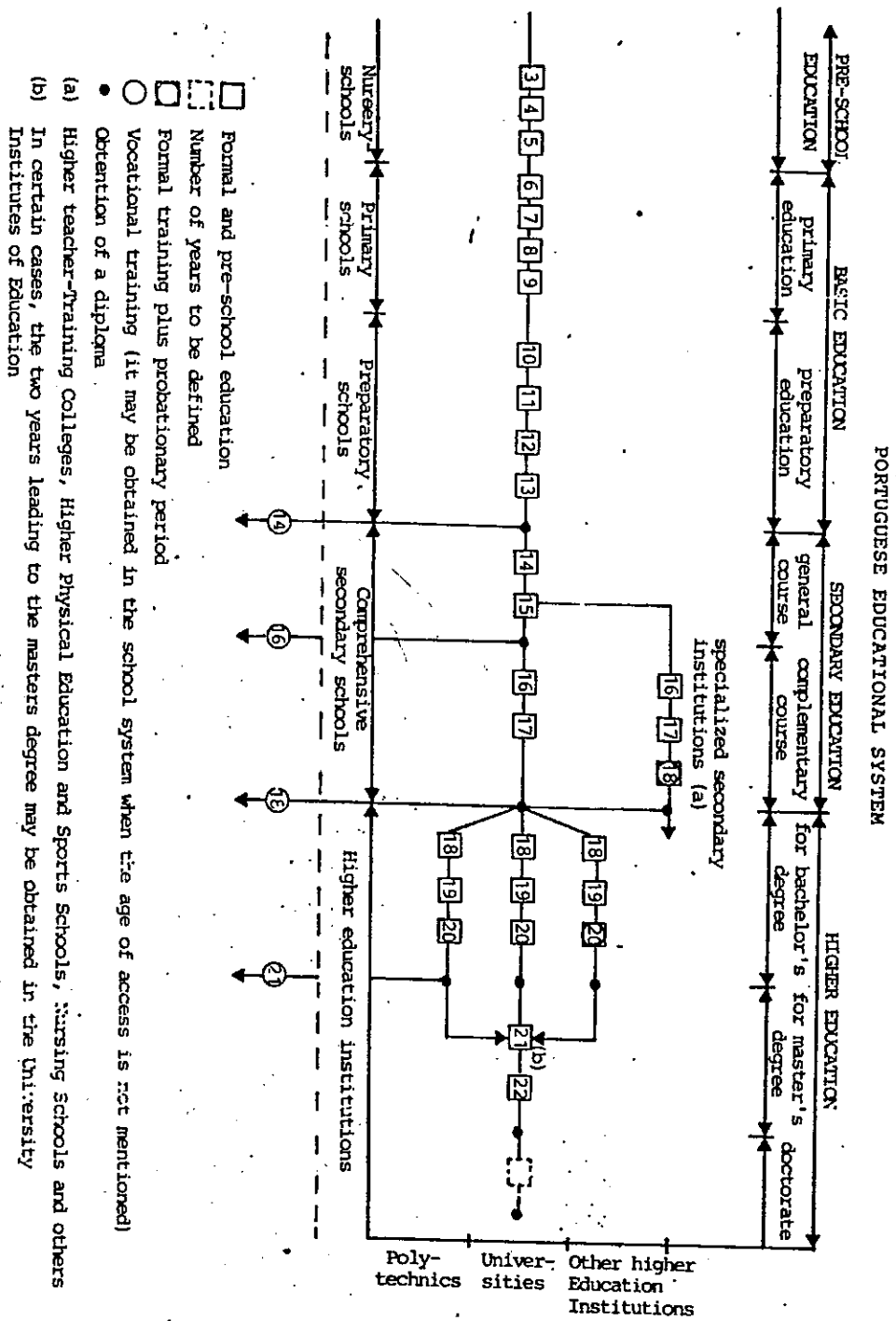
- No to the Serviço Cívico.

- For Student Control over School-leaving.

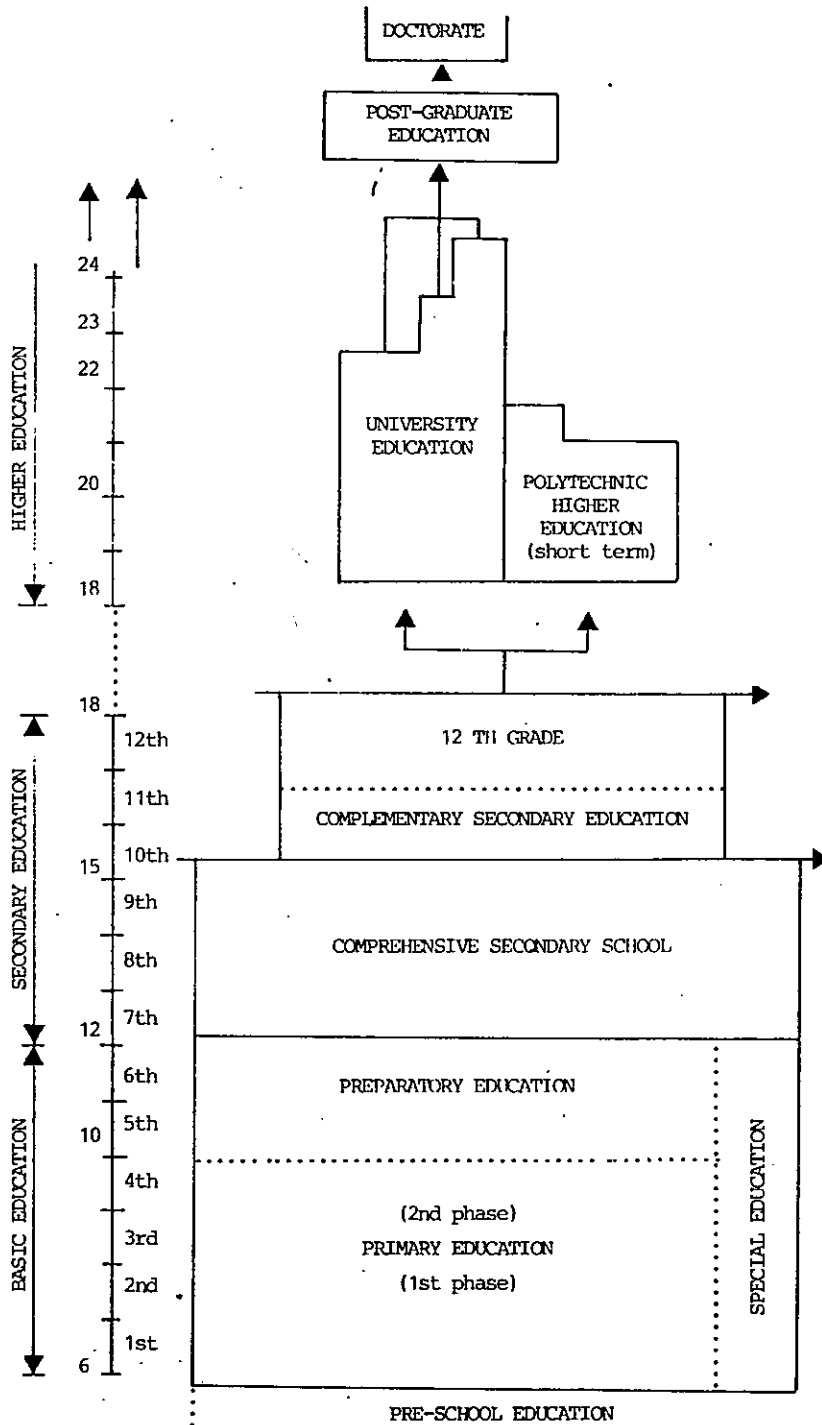
- For a Real Alliance with the Struggles of the Workers Against Exploitation and for Socialism.

(Source: P. Mailer (1977), Portugal, The Impossible Revolution, London: Solidarity, p. 381.)

Appendix IX

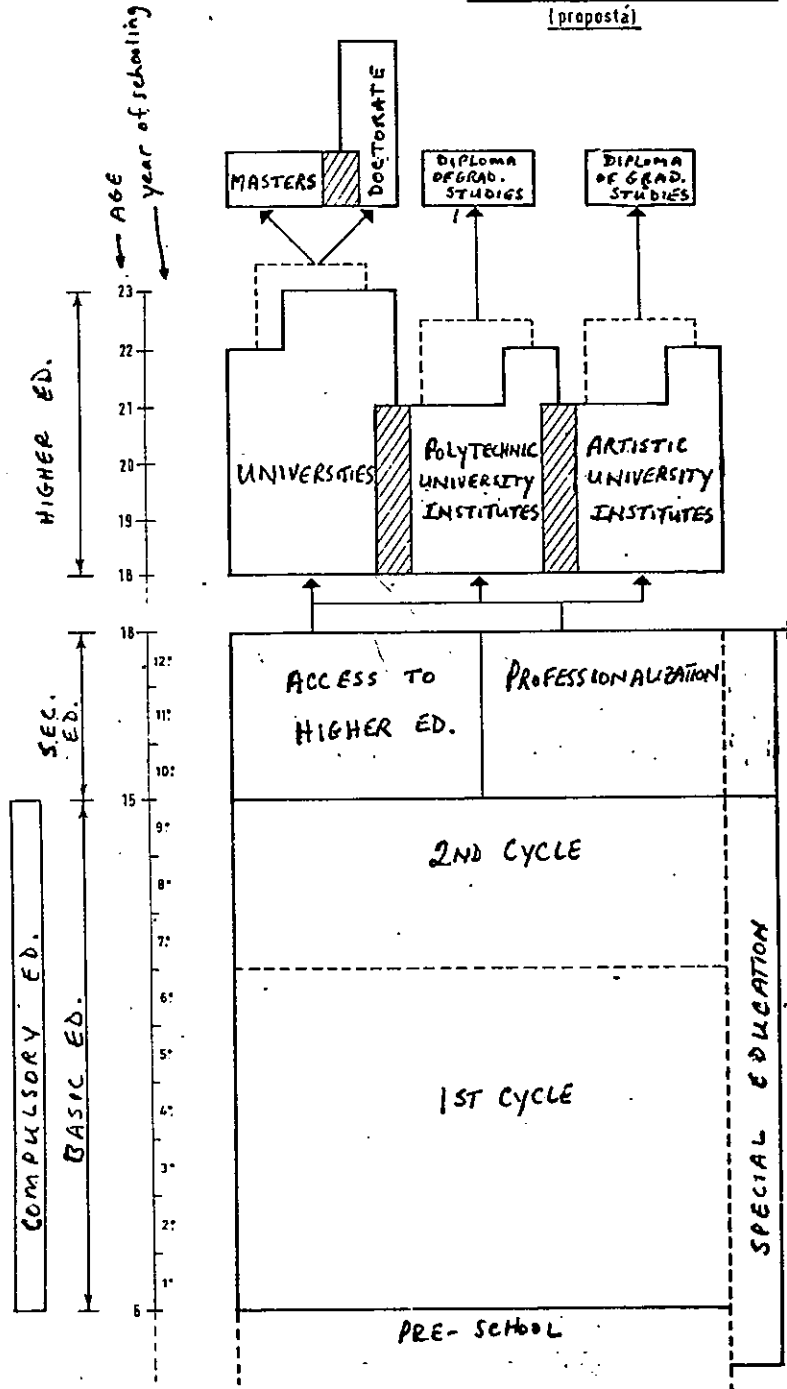


The educational system in Portugal



### The Education System as Proposed in the

LEI DE BASES DO SISTEMA EDUCATIVO  
(proposta)



(Source: Vitor Crespo (1980), Lei de Bases do Sistema Educativo (Projecto para Discussao Publica), Ministry of Education and Science, April, p. 37)

Appendix X

Education Expenditure as % of Gross Domestic Product

	<u>Portugal</u>	<u>United Kingdom</u>
1970	2.1%	5.2%
1973	2.7	5.1
1975	4.9	6.4
1976	4.3	6.1
1977	3.8	5.5
1978	3.7	5.4
1979	3.2	5.2
1980	4.3	5.5

(Sources: José Salvado Sampaio (1980), Portugal, A Educação em Números, Lisbon, Livros Horizonte, p. 147;

Central Statistics Office (1983), Annual Abstract of Statistics, 1983 Edition, London HMSO, Table 3.2, p. 64.)

Education Expenditure as % of Gross Domestic Product

	<u>1965</u>	<u>1973</u>
Portugal	1.44%	2.7%
Spain	2.20	7.2
Greece	1.89	5.6

(Sources: C. Almeida and A. Barreto (1970), Capitalismo e Emigração em Portugal, Lisbon: Prelo Editora, pp. 32-35;

Boletim Informativo, M.E.N., 1973-74, p. 6.)

Appendix XI

Contact Activities

(Escola do Magistério Primário)

Contact Activities shall involve two phases:

1. - Contact with the general problems of the community;
2. - Contact with children of different age levels.

I. Objectives

A. Contact activities with the general problems of the community:

To direct the student towards a recognition of the role the educator is called upon to play as an agent of transformation, making him/her aware of:

- the general problems of the collectivity and the socio-political transformations of the country;
- the socio-cultural situation of the family of pre-school and school aged children in rural and urban areas;
- the pedagogic life of the establishments and institutions of pre-school and primary school education;
- the experiments and initiatives in process.

B. Contact activities with children of different age levels:

- to make possible direct contact with the children, outside the constraints of the official learning situation;
- to make possible a conscious choice between nursery school education and primary schooling.

II. General Operating Norms

A. Contact activities with the general problems of the community:

Centred on observation, contact activities, which should be as diversified as possible, provide a concrete, but not exclusive,

base for exercises to be developed throughout the school year.

Should be oriented and accompanied by teachers/lecturers, in order to make proper use of the observation techniques which shall produce the data to be analysed at a later date in more detail.

Before participating in these activities, students should participate in their planning and be aware of the objectives that they aim to achieve.

The planning and preparation of participation in contact activities shall take place during the time-space allotted to seminars. Such planning and preparation must include the participation of teachers/lecturers from each area of the curriculum, so that the underlying spirit of interdisciplinarity of the contact activities is respected.

These activities are to be carried out during the first academic period (Contact activities plus seminars occupy a period of 5 hours per week out of a weekly timetable of 32 hours).

On returning to the school, the students will organize, in groups with the aid of the teachers, reports which synthesize the observations and analyses carried out.

**B. Contact activities with children of different age levels:**

After the 1st phase of contact activities a 2nd phase will begin, in which students will carry out informal activities with children.

These activities should be the responsibility of the student-teachers, but with the involvement of the entire teaching staff of the college.

The activities of each session should be recorded, periodical reports should be made on observations and teaching staff should

help in the planning and supervision of these tasks so that learning theory can be applied as closely as possible to the practices carried out.

"Plano de Estudos das Escolas do  
Magistério Primário - 1976-77"

(Ministry of Education and Scientific  
Investigation, Secretary of State for  
Pedagogic Orientation, Directorate-  
General of Basic Education.)