OTHER THEMES

Curriculum Autonomy in the Education Systems of Portugal and Canada

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ABSTRACT – Curriculum Autonomy in the Education Systems of Portugal and Canada. Many authors argue that autonomy is nonexistent in a centralized education system, given that it is a characteristic of decentralization, whereas schools in a decentralized education system have more autonomy. The researchers compare the level of curriculum autonomy granted to schools in a centralized system (Portugal) and to those in a decentralized system (Canada), based on interviews and content analysis of those responsible for the administration and organization of schools. It appears that, in the Portuguese case, there is some school autonomy, essentially centered on the collective, although teachers do not recognize or take ownership thereof. In the Canadian case, autonomy is granted on an individual basis to each teacher.
Keywords: **Autonomy. Decentralization/Centralization. Curriculum. Education Systems.**

RESUMO – A Autonomia Curricular nos Sistemas Educativos de Portugal e do Canadá. Muitos autores argumentam que a autonomia é inexistente num sistema educativo centralizado, dado que é uma particularidade da descentralização, enquanto as escolas de um sistema educativo descentralizado têm mais autonomia. Os investigadores comparam o grau de autonomia curricular conferido às escolas de um sistema centralizado (Portugal) e às de um descentralizado (Canadá), a partir de entrevistas e análise de conteúdo de responsáveis pela administração e organização das escolas. Constata-se que, no caso português, existe alguma autonomia da escola, fundamentalmente, centrada no coletivo, embora os professores não a percecionem nem se apropriem da mesma. No caso canadense, a autonomia é conferida a cada professor na sua singularidade.
Palavras-chave: **Autonomia. Descentralização/Centralização. Currículo. Sistemas Educativos.**

Introduction

School autonomy, in the administration and management of elementary and secondary schools, has long been a topic of discussion and debate in education circles, within the Portuguese educational system[1]. While the government argues that schools have been given greater autonomy via the consecutive publication of legislation to support it, empirical research of recent decades underlines the contradiction between the legislation, political discourses thereon, and the harsh reality of schools' autonomous practices (Lima, 1992; Torres, 2004; Torres; Palhares, 2010).

This debate is often accompanied by demands for reform for the decentralization of the education system in a country with a political educational model regarded as traditionally centralized. In this context, centralization/decentralization of the education system is central to the study on the autonomy granted to the administration and management bodies of its schools. Many authors argue that autonomy is nonexistent in a centralized system because it is a strand of decentralization, which leads us to believe that schools in a decentralized education system might have more autonomy. From this context, the study of autonomy, and its correlation with emerging possibilities of somewhat decentralized educational systems, becomes relevant. For this purpose, it is important to compare the Portuguese education system, which is more centralized, with the Canadian (Ontario) education system, which is more decentralized, to understand the level of autonomy granted to schools in both systems.

To have an understanding and a clear analysis between the theory and practice of the level of autonomy granted to Portuguese schools, we wanted to go beyond a mere conceptual and empirical study of the concept of school autonomy. Our aim was to study the autonomy of schools in the context in which it is experienced, in its relationship with the State, by comparing the Portuguese education system, with the education system of Ontario, Canada, with regards to the organization and operation of schools, particularly in the decision-making process and the interaction with regional and central powers.

The geographical and historical characteristics of both countries in the field of education differ greatly. In Portugal, located in the southwest of Europe, the State took over the responsibility for education from the Church, creating a vast network of public schools throughout the 19th and 20th centuries. With this increase of schools under their jurisdiction, the national government, and its central administration offices, took control of the education system, making it strongly centralized, with schools being directly managed by the State (Lima, 2011). Conversely Ontario, Canada, located in North America, is a province with a sub-national administrative division under the jurisdiction of the Canadian federal government where there is no national ministry of education (Christou; Cousins, 2013; Galway; Sheppard, 2015; Young; Levin; Wallin, 2006; Zegarac; Franz, 2007). Primary and secondary ed-

ucation is the responsibility of each province and each territory, and, therefore, is not under the jurisdiction of the federal government (Galway; Sheppard, 2015; Lessard; Brassard, 2009; Pervin; Campbell, 2011; Zegarac; Franz, 2007). Consequently, the Canadian education system is, in macro terms, a decentralized system, having been one of the first countries to achieve this decentralization (Young; Levin; Wallin, 2006).

Our research sought to, not only determine the level of autonomy given to schools in a centralized (Portugal), and in a decentralized education system (Ontario, Canada), but also understand the relationship between centralized contexts and the emergence of somewhat autonomous practices. It was also important to understand whether we can speak of autonomy or "school autonomy(ies)" as a global concept, in which school autonomy can also be studied as a "collective" decision-making power versus an "individual" decision-making power, in which autonomy is assigned exclusively to one individual, regardless of whether the system is centralized or decentralized. That having been said, we inquire whether the collective power in schools of a centralized system can have more autonomy at its disposition than those in a decentralized system, as well as whether there may be more individual autonomy in a decentralized system, than in a centralized one.

Methodology

The aim of this study is thus to understand the two education systems in terms of school autonomy, through the school agents' perception of the curriculum, particularly regarding its design, management, and delivery. For this purpose, we opted for a qualitative methodology with a comparative approach, as the "qualitative method represents a form of data collection and analysis, with a focus on understanding and an emphasis on meaning. [...] Specifically, it is a method for examining phenomena, predominantly using 'words' for data" (Edmonds; Kennedy, 2017, p. 141-142). Precisely because we intend to measure the level of curriculum autonomy in two education systems based on the beliefs of those who lead the schools, we have combined a qualitative methodology with a comparative approach. This way, we can better understand how autonomy is perceived in schools in respect to the curriculum of both systems. When you consider it comparative studies have been geared towards "[...] understanding the dynamics of education systems or of aspects related therewith by means of comparison" since their inception (Ferreira, 2008, p. 125).

For this analysis Data were collected from documentary research and semi-structured interviews. The former, focused on document sources, mainly laws issued by the authorities with oversight powers over schools, and the latter on the beliefs of individuals, directly linked to school management. As we regard the individuals' perception of the true practice of autonomy crucial, we used the semi-structured interview as it allows for the analysis of the "[...] meaning that the agents give to their practices and to the events with which they are faced" (Quivy;

Campenhoudt, 1995, p. 193). The interviews were conducted with two groups of individuals, directly linked to school administration and management in the education systems under analysis. We interviewed school principals, identified, in the Portuguese case, with the codes DP-A to DP-G, and in the Canadian case, DC-A to DC-G. We have also sought to deepen this understanding by considering the professional opinions of other individuals who have a close working relationship with school principals, in order to grasp the relationship between the different powers, and the actual autonomous power of school principals. In the Portuguese case, inspectors from the Inspectorate-General for Education and Science are identified with the codes IP-A and IP-B, and, in the Canadian case, school superintendents are identified with the codes SC-A and SC-B. This consequently allows for the analysis of a larger population based on a smaller one (Lune; Berg, 2017), using a sampling according to the criterion of "theoretical saturation" (Glaser; Strauss, 1967). The questions were developed according to the objectives of the study, namely: to identify the educational authorities and/or school bodies responsible for the design, management, and delivery of the curriculum (*How do you assess the role of the school in designing, managing and delivering the curriculum?*); to determine the responsibilities of the school in organizing and developing the curriculum (*How does the school deal with the managing and delivering of the curriculum?*); and to determine the role of teachers in defining the syllabus of the curriculum subjects (*What is the teachers' mindset regarding the syllabus of the curriculum subjects?*).

The data collected from the interviews were then analyzed according to the content analysis methodological framework, regarded as "[…] a group of analysis techniques in communication that aims to obtain, through systematic and objective means, a description of message content" (Bardin, 1977, p. 33). This technique allowed us to "[…] methodically process information and testimonials that have a certain degree of depth and complexity" (Quivy; Campenhoudt, 1995, p. 227), appropriate for questioning what is implicit (Quivy; Campenhoudt, 1995). Content analysis allowed for the careful, detailed, and systematic interpretation of the information collected and led to the identification of patterns, themes, assumptions, and meanings (Berg; Latin, 2008; Leedy; Ormrod, 2005; Neuendorf, 2002), as described below.

Curriculum Autonomy: preliminary remarks

In this study, we focus specifically on curriculum autonomy in the education systems of Portugal and Ontario, Canada. The curriculum is regarded from an operational perspective, that is, as the group of subjects to be taught to students, as well as the syllabus and the school hours dedicated to each subject. It was not our intention to analyze the concept of curriculum *per se*, but rather to identify its authors to clarify the level of autonomy of schools in its design and delivery. As such, results emerged regarding *decision-making levels* and the *responsibility of*

the school, the former being understood in the various levels of decision-making in the hierarchy of its education system (central, regional, local), and the latter in the role of the school and that of its agents - principal and teachers - in collective and individual curriculum-related decisions.

Levels of curriculum decision

As previously noted, the education systems of Portugal and Canada (Ontario) are organized differently, which is reflected in the *decision-making levels* (see Table 1) in terms of curriculum design and delivery. In both cases, the statements given by the interviewees allow us to conclude that the curriculum is defined at the central level[2] by the respective ministries of education, as concurred in some studies that focus on these education systems (Fullan; Leithwood; Watson, 2003; Young; Levin; Wallin, 2006; Morgado, 2011; Pacheco, 2001; 2008). In the Portuguese case, the powers of the ministry of education to "[…] formulate, conduct, implement and assess" the whole educational policy for elementary and secondary education, is enshrined in the government's Organic Law – Article 21(1) of Decree-Law No. 138/2017 of 10 November (Portugal, 2017) –, and not in Education Law. Thus, as one interviewee stated, any change in the curriculum depends "[…] on political will!" (DP-G), clearly showing that the government is the ultimate educational authority.

Table 1 – Levels of curriculum decision

Portugal	Canada (Ontario)	Inferences
"It's the Ministry of Education who defines the curriculum […]". DP-B / "[…] we have to comply with the curricula […] It's formatted for a country [...]" (DP-G).	"[…] everything is already in terms of subjects per grade, there're specific expectations and there's overall expectations per subject, per grade [...] those are already set out from the province of Ontario" (DC-A).	The curriculum, in both countries, is determined at the central level.
"[…] teachers' associations play an important role when the programme itself is being drawn up" (IP-B).	"[…] when they're [ministry of education] developing or upgrading curriculum, they have many focus groups" (SC-B)	Schools in both education systems are not the creators of the curriculum.
"[The school] [...] actually has little autonomy […]" (IP-B). "[...] it's the Pedagogical Council that defines [...]" (DP-A).	"So, the syllabus [of secondary curriculum] is planned by the consultant at the Board who gives us our course profiles and says here are the units of study that you must teach [...]" (DC-F)	There is some local autonomy in defining the curriculum.
"[…] we are the ones who actually define them [optional subjects] [...]" (DP-E).	"[…] we, as a school, have autonomy in terms of what elective credits that we offer [in secondary schools] [...]" (DC-F).	The school has some autonomy in defining the curriculum.

"[...] schools want a lot of autonomy and then when it comes to implementing it, they don't want autonomy because [...] it takes a lot of work and responsibility [...]" (DP-G).	"[...] having it [curriculum] centralized ensures that all of our students, regardless of where you are, they're going to benefit from the curriculum and that [...] they're all going to be working with the overall expectations [...]" (DC-F).	There are some contradictions in the Portuguese case.
"[...] it is very convenient for a lot of people to want to reclaim autonomy and then when you give it to them, they don't know what to do with it, or they don't know how to implement it" (DP-G).		Tacit acceptance of the level of curriculum autonomy of the school, in the Canadian case.

Source: Authors' own construction.

In the case of Canada, the government of the province of Ontario determines, through the *Education Act* (Canada, 2013), that it is the ministry of education that is responsible for the curriculum, and curriculum guidelines, for elementary and secondary education (Cerna, 2014; OECD, 2011; 2014; Young; Levin; Wallin, 2006). However, the same legislation states that the minister may allow school boards, local provincial education entities, the powers to augment the curriculum with teaching areas or subjects that are not in the prescribed curriculum guidelines (Cerna, 2014; OECD, 2011; 2014; Young; Levin; Wallin, 2006).

In terms of the authorship of the school curricula, although we found differences in both countries, the interviewees from both Portuguese and Canadian schools claimed not to be involved in the process, nor to know the identity of the authors of the curricula. However, in the case of Portugal, when we consulted the actual curriculum documents posted on the Directorate-General for Education's website of the ministry of education of Portugal, we found that the documents do in fact contain the names of the team members who authored the curriculum documents, as well as the advisors, higher education professors and elementary and secondary school teachers, depending on the curriculum grade level. What stands out in the statements given by the Portuguese interviewees is the belief that these groups occupy a privileged position within the education authority, and that schools are excluded from the curriculum development process. As highlighted by the statements made by the interviewees, the absence of schools in the design of the curriculum does not work in its favor, arguing that the curriculum should address the needs of each school, the context in which it is located, and the students it serves, which they believe is not the case within the existing framework.

Unlike in the Portuguese case, in Ontario the curriculum documents do not contain the names of its writers, and/or advisors, but does acknowledge the contribution of various entities, on the last page of all documents. According to the Canadian interviewees, the authors/advisors are officials of the ministry of education, experts in curriculum development, who consult with various external groups when preparing

or amending the curriculum. However, it was not possible to determine which groups are consulted, nor their identity. In this case, the identity of the authors of the curriculum is not public, unlike in the Portuguese case.

We can conclude that, in terms of curriculum autonomy, Ontario schools are not involved in curriculum design (*overall* and *specific expectations*), nor are their teachers visibly represented in curriculum development teams. In Portugal, although not all teachers participate in the process, there are representatives of elementary and secondary teachers in the elaboration and/or in consultation. However, we believe that by stating that schools have no indication of who writes the curricula, the interviewees implied that Portuguese teachers do not identify with such representation. Therefore, we cannot say that Portuguese teachers collectively participate in curriculum development, especially because the few who do are selected by the ministry of education and are not necessarily representative of their peers.

The analysis of the interviews demonstrates how the ministries of education of both countries do delegate some decision-making power to local level, although the level of this autonomy, to make local curriculum decisions based on a prescribed curriculum, differs widely from one country to the other.

In Ontario, the ministry defines the *core curriculum* by subject, comprised of mandatory *overall expectations* (general objectives), and *specific expectations* (specific objectives). The board and its teachers can then select the specific expectations in that year (Young; Levin; Wallin, 2006). In this case, it is a decentralization by delegation approach (Weidman; DePietro-Jurand, 2011), in that there is administrative or legal transfer of powers to the school bodies, elected or appointed, such as school boards. In addition to this delegation, the minister of education grants boards the power to approve changes in some aspects of curriculum and curriculum delivery so that the overall expectations can be met by also meeting the needs of its policies and the local school needs. Thus, the ministry of education shares the definition of pedagogical matters with school boards, as per the *policy tutelage*[3] model by Bedard and Lawton (2000).

The education system in Portugal is quite different from that of Ontario because it does not have a regional structure or local authority outside of the school to design or manage curriculum matters. However, some of these curriculum matters are decided within the school itself (Pacheco, 2001; 2008), although the agents do not fully acknowledge this. In fact, while school principals state that "[...] schools do not design the curriculum" (DP-G), they also admit that "[...] schools actually have a small margin of autonomy in curriculum management" (DP-F). the data analysis led us to believe that there are two levels of decision making: the ministry of education's central administration office and schools, and that the latter has an active role therein, as stated by Pacheco (2001; 2008), thus confirming the existence of the *policy tutelage* model of Bedard and Lawton (2000) in the Portuguese education sys-

tem. Therefore, we ascertain the existence of some autonomy of schools in curriculum decisions, even if such autonomy is limited and not quite appreciated by the interviewees. Consequently, and building on the statements given by the Portuguese interviewees, we ascertain that teachers in their schools do in fact make curriculum decisions via their pedagogical councils[4]. We can, therefore, conclude that Portuguese teachers, as a collective body, can make curriculum decisions (Pacheco, 2008; Morgado, 2011).

The Ontario education system differs from that of Portugal as schools do not have a pedagogical council, or a similar collective internal body recognized by the ministry, with powers to make curriculum decisions for the school. According to the interviewees, each teacher, in every school, is the individual in charge of curriculum organization and delivery, while school principals, superintendents, and curriculum resource experts, can also provide instructional leadership to teachers. This power afforded to Ontario teachers to make individual curriculum decisions, is a result of ministry laws and regulations. The minister of education provides boards with the authority to approve changes to the curriculum (Canada, 1990), thereby sharing responsibility for pedagogical matters with the local authority (OECD, 2011; 2014; Cerna, 2014). Moreover, the ministry grants teachers the autonomy to manage the delivery of curriculum using their professional judgement: "Teachers will use their professional judgement to determine which specific expectations should be used to evaluate achievement of the overall expectations, and which ones will be accounted for in instruction and assessment but not necessarily evaluated" (Ontario, 2010, p. 38). Allal (2012, p. 1) states that teachers' "professional judgement intervenes in all areas of their activity [...] when it takes into account the resources and constraints of their work setting and is informed by professional knowledge acquired through experience and through training". According to the interviewees, "[...] the curriculum is [...] unpacked by the system" (SC-A), and, ultimately, "[...] teachers can select which curriculum expectations they teach, depending on the students' needs and the assessments that they do on the students" (DC-G). Therefore, the ministry of education defines the overall expectations, which constitute the core curriculum, for the whole province. Based on this common curriculum, it is then up to each board to define guidelines for its respective schools to implement the curriculum. An example of this practice is the power of each board to select the content of some of curriculum, as for example, specific expectations, delivery, assessment, to be taught in each academic year. Based on the board's guidelines, and with reference to the broad curriculum areas defined by the ministry of education, each teacher can decide which specific expectations to teach and how those expectations will be accessed in the academic year. Therefore, in terms of school autonomy, the data reveals that the curriculum practice of teachers, school principals and superintendents is in line with Ontario legislation, and their practices are indicative of the use of the autonomy they are given.

Although the analyzed interviews show how the curriculum is designed and managed through more centralized practices in the Portuguese education system, than in Ontario, the degree of autonomy given to school agents is perceived as being different. While the Canadian school agents claim to have enough pedagogical autonomy to make the necessary decisions for implementing and delivering the curriculum, the Portuguese agents consider that they have little or no autonomy, supporting the idea of a centralized reality in Portugal. Indeed, all Canadian interviewees agreed that the curriculum is established at the central level to ensure an equitable teaching and learning process. The statement "we have as much autonomy as we need", given by a superintendent (SC-B), corroborates that schools should not have more power to make curriculum decisions, either because equity is not guaranteed or because some teachers are not able to embrace and use the autonomy they already have.

The position of the Portuguese interviewees, in addition to being contradictory, is not homogeneous. Although they recognized the existence of the ministry of education's overly centralized design and management of the curriculum, some consider that the decision-making power should be "centralized"[5] by another educational authority, shifting the decision-making power to a local authority or to the school principal, while a minority considers that the school should have this autonomy. However, we consider that the local authority, by having this curriculum autonomy, would play the current role of the ministry of education as a regulatory body, shifting the control of schools from central to regional power, the level of autonomy of schools remaining unchanged, as stated by Lima (2015; 2021).

In Portugal, the transfer of curriculum autonomy to the school principal also has its drawbacks. Considering that school principals hold office for mandates of four years, it does not seem to us that this option can guarantee the continuity of an educational policy that schools call for, as it may be subject to the management and leadership of the individual that holds the contract position for the specified period of time.

We understand, through the statements given by the Portuguese interviewees, that there is no consensus on the issue of transferring the level of decision-making regarding curriculum matters to the local authority (municipality), to the school or to the school principal, and even less to the school as a whole. What stands out in the statements given is the fear that "[...] if schools had full autonomy, they would not know how to use it [...]" (IP-B). Given the divergence of views on the level of autonomy to be given to schools, we ponder the reason for such contradiction since, on the one hand, the school agents criticize the centrality of curriculum decisions, and on the other hand, they consider that the design and management of the curriculum should remain outside the scope of the school.

School responsibility in curriculum matters

Given the diversity of views and opinions of the interviewees regarding the level of autonomy that schools have, we find that it is necessary to analyze the *school's responsibility*, namely, how it deals with curriculum autonomy (see Table 2). Different contexts emerged from the Portuguese and Canadian assertions regarding the school's capacity to design, organize and manage the curriculum, the constraints it faces in implementing it, and the role of teachers in curriculum matters. The Portuguese context revealed to be much more complex than the Canadian one.

Table 2 – School responsibility for curriculum organization and management

Portugal	Canada (Ontario)	Inferences
"How do we deal with it? In a pragmatic way, in a very direct way: what we do depends on the human resources we have [...]" (DP-F).	"[...] that's [the selection of the electives] based on student interest, and it's based on teacher interest as well" (DC-F).	Influence of teaching staff's interests in curriculum decision-making.
"[...] the squabbles begin between departments, between disciplinary groups, which is it? who loses, who wins [...]" (DP-G).	[Not referred to]	Internal constraints/ conflict.
"[...] there's a legislative straitjacket that subject to compliance with programs, obliges [teachers] to inform at the end of the year [...] how far they reached in the teaching of the subject [...]" (DP-G).	"[...] they [courses] are still attached to some sort of curriculum policy document. So, you might take [...] civics at one school and I might take [...] world history that would cover the same kind of topics, right. But they would all still be bound by the same curriculum" (SC-B).	Curriculum autonomy given to teachers by the respective Ministries of Education.
"[...] all pedagogical measures [...] are discussed and approved by the Pedagogical council under the proposal of the school principal, of disciplinary groups, or proposals that arise even in the Pedagogical council" (DP-G).	"[...] the teachers use their professional judgement [...] to unpack that [the curriculum] and to deliver it" (SC-A).	Collective versus individual teacher autonomy.
"[...] all the articulation and preparation work is done at disciplinary group level, or at department level afterwards, and at the pedagogical council level. So, between these 3 levels [...]" (DP-G).	"[...] it's really left up to teachers as to whether or not they want to do that [work collaboratively]. It can't be mandated" (DC-C).	
"[...] it is one of the serious problems [...] more and more education professionals know the textbooks better and the programs less" (DP-B).	"[...] it's up to the individual teachers to figure out how they are going to implement it [curriculum]" (DC-E).	Teachers' knowledge and management of the curriculum.

Source: Authors' own construction.

In the Portuguese education system, a school has autonomy to define small matters of the curriculum structure[6], being "[...] an area of freedom which the school has" (DP-A), as per Morgado's perspective (2003). However, according to the interviewees, in this definition, schools are faced with administrative and legal constraints imposed by the ministry of education, as argued by Lima (2011; 2021), as well as the school's own constraints, which hinders them from exercising their autonomy. We note that the same constraints exist in the education system in Ontario, to the extent that the ministry of education and boards impose parameters that must be met, although to a lesser extent and with less ministry oversight. At the school level in both countries, we find completely different constraints, which arise from the collective autonomy of teachers, in the Portuguese case, and the individual autonomy of teachers, in the Canadian case.

In Portugal, the first administrative and legal constraint that hinders the exercise of curriculum autonomy arises from the legal impositions issued by the ministry of education. On the one hand, the ministry of education grants autonomy to the school to organize its curriculum, allowing the selection of electives and optional subjects; on the other hand, it lists in the national curriculum itself the subjects that can be chosen. In our understanding, the ministry of education restricts the autonomy of the school in its curriculum organization when determining the subjects offered by the school (electives) and optional subjects, as the school cannot offer a subject that is not included in the curriculum as an option. The same is true in the Ontario education system; however, Canadian interviewees did not report constraints in selecting optional subjects, possibly due to the fact that the curriculum covers a significant number of possible subjects. It should be noted that each Portuguese school does have autonomy when choosing optional subjects, thus, in essence, designing its own curriculum.

Portuguese school principals repeatedly highlighted a second legal constraint imposed by the ministry of education in secondary education – that of the minimum number of students required for ministry authorization for the introduction of an optional subject. However, schools have the autonomy to organize students in such a way as to be able to offer these optional subjects, by simply grouping students interested in those subjects, from different classes and different courses. Thus, it seems to us that this limitation can be overcome, depending on the school's capacity to exercise autonomy, as stated by Barroso (1997). However, we find that this is not the case, as schools offer the optional subjects that are more convenient to facilitate internal school organization, namely assigning teachers school grades/subjects and the timetabling, thus limiting the subjects that can be offered to its students.

Unlike the Portuguese, the Canadian interviewees did not refer to the minimum number of students required to open an optional subject as being a constraint, so we deduce that the minimum numbers are low and easily achievable. However, they emphasized a single constraint regarding optional subjects, which was not mentioned by the Portuguese

interviewees, that of the number of classes (*sections*) authorized. In other words, as the school is bound by the number of sections authorized by the board, the school follows a hierarchy in the offering of subjects: first, it forms sections for the compulsory subjects, then for the "compulsory" (elective) optional subjects, and finally for the supplementary optional subjects that the students wish to attend, but can never exceed the total number of classes allowed. Thus, it seems to us that the autonomy of the school in offering optional subjects depends on the board's allocation to each school, reflective of student enrolment. Regarding the selection of optional subjects, the Canadian interviewees also mentioned that the school principal occasionally collaborates with teachers in the selection of optional subjects offered to students. However, they stressed that the determining factor in offering an optional is the number of registered students and not the teachers' decision. This is not the case in the Portuguese education system, where we see a strong collective autonomy in the teaching staff defining the curriculum structure through the selection of optional subjects.

In fact, the Portuguese interviewees underlined the collective autonomy of the schools' teaching staff as an internal factor that conditions the implementation of the schools' own autonomy. As one interviewee explained:

> [...] we have groups [teachers organized by subjects taught] that also look after themselves and sometimes this pedagogical decision [...] is pushed aside because the groups consider their interests first. [...] The more hours there are for a subject, the more timetables there are. And [...] this actually happens in schools (IP-B).

The interviewees confirmed that the selection of optional subjects, and subjects offered by the school, is made according to the professional qualifications of the school's teaching staff. This can create two potential challenges, as explained by IP-B, when the school must decide on the optional subjects it can provide: on the one hand, where the decision is made and, on the other hand, the administrative matters associated thereto. Given that it is up to the pedagogical council to decide on curriculum matters, "[...] it is usually the school principal who will raise the question" of administrative constraints which must be articulated "[...] with other variables, namely work schedules" (IP-B). In other words, school principals are responsible for the preparation of timetables and work schedules according to the policy of autonomy, administration and management of pre-school education, elementary and secondary education public school establishments (RAAG)[7], but the choice of the optional subject rests with the pedagogical council, in which all teachers are represented through the respective department coordinator. We believe that the combination of these factors explains why the ministry of education determines that the chair of the pedagogical council is the school principal. In turn, the Teaching Career Statute[8] (Portugal, 2012) stipulates an obligation for a school to provide

a permanent teacher with a full work schedule[9]. It is at the crossroads of these two laws where the "tension" arises when deciding on optional subjects. The arguments given by the school principals confirm that the school exercises its autonomy according to the interests of its teachers and to avoid having permanent teachers without schedules, which would result in their consequent departure from the school. Given this scenario, we question whether schools in Portugal should, in fact, have full curriculum autonomy.

Although the Portuguese interviewees recognize the importance of school autonomy because "[...] the agents who are in the field know the variables [of each school] more intimately than those who are further away [...]" (IP-B), most of the Portuguese interviewees considered that the school is not yet prepared to fully undertake autonomy in curriculum decisions. They recognize that granting full autonomy to the school may not be a wise decision, as some schools are not prepared to work autonomously, or they do not want the autonomy as it is more convenient to receive the ministry of education's guidelines and implement its decisions. Therefore, if on the one hand most of the interviewees argued that the school should have more autonomy in curriculum matters, on the other hand, they found this possibility troubling for the future of the schools.

During the interviews, few Canadian school principals were in favor of the school having autonomy over its curriculum, given the existing cultural diversity, while the majority stated that they have sufficient autonomy. The two superintendents considered that schools should not have autonomy to design their entire curriculum, but only to manage it, because they are not prepared to do so. As one superintendent stated, "[...] as a person responsible for many schools, I would say, where we are right now, it needs to be more centralized as to what the 'what' is, not the 'how' [...]" (SC-B). This position places boards and schools within Bedard and Lawton's *administrative agency* model[10] (2000), in that schools act as implementers of their boards' directives.

As the need for autonomy is a cross-cutting concern in the discourses of the Portuguese interviewees, we found, from the analysis of the interviews, that curriculum autonomy is also a reason for rejecting autonomy, due to the inability to implement the curriculum, the lack of preparation or the fear shown by some to undertake such autonomy.

In Ontario, different constraints on the implementation of curriculum autonomy emerged from the discourses of the interviewees, arising, on the one hand from what is imposed by the board and, on the other by the powers granted by the ministry of education regarding the individual autonomy afforded to each teacher. We believe that the historical context of the Ontario education system, as well as the way it is organized, favors the existence of individual pedagogical autonomy of teachers. The analysis of the statements allows us to understand that the agreements established between the unions and the ministry of education of the province of Ontario consider that each teacher has

the ability to exercise *professional judgement* and, as such, can make independent pedagogical decisions (Allal, 2012). This has cemented this type of individual pedagogical autonomy. In our view, it is, as Morgado states (2011, p. 396-397), a "construction materialized by teachers" in that they decide "*what to teach, when, how, and what for*". However, by analyzing the statements, we realize that this individual pedagogical autonomy, which does not oblige teachers to account for pedagogical matters, leads to discomfort and distrust on the part of local structures, as well as limits the principal's autonomy in the equitable delivery of the curriculum. Consequently, the government's reconciliation of administrative and professional accountability leads to the autonomy given to teachers to be accompanied by control, exercised by the board's structures, namely by the superintendent and the school principal, to ensure teacher compliance with the ministry curriculum.

In the Portuguese education system, while we can admit that the ministry of education recognizes the technical and scientific autonomy of teachers, they are obliged to comply with a national curriculum in the performance of their duties. The analysis of the statements shows that this bureaucratic control is done through the legal obligation of teachers to record the curriculum covered and the compliance with the curriculum in minutes of periodic departmental meetings. Thus, we acknowledge that, unlike in the Ontario education system, there is no trust placed by the ministry of education on individual pedagogical autonomy of teachers in the Portuguese system, which may also explain the ministry's willingness to grant autonomy to a collective group of teachers.

Unlike the Canadian principals that were interviewed, the Portuguese school principals expressed their concern regarding the prevalence of textbooks in the classroom, as teachers "[...] are still very attached to the textbooks, confusing the curriculum with the textbook and the textbook with the curriculum" (DP-E). In this context, we consider that the lack of knowledge of the curriculum by teachers and, consequently, wasting of "windows of opportunity" (IP-A) limit the autonomy that is afforded to them to manage and teach the syllabus. Such apparent unawareness can be a relevant constraint in the internal experience of practices of curriculum autonomy. There is, therefore, no construction of a pedagogical autonomy (Pacheco, 2008). On the contrary, the excessive dependence on the textbook leads to the passivity of teachers when planning and delivering the curriculum.

Adding to this, another obstacle to the full implementation of the autonomy afforded to Portuguese teachers is "corporatist" behavior. As the analysis showed, the decisions that can be made by the pedagogical council are conditioned by the interests of the teaching staff itself, and not by those of the students, which shows a perverse practice of autonomy. In the case of Ontario teachers, this situation does not apply because curriculum autonomy is not a collective right, but rather an individual professional choice.

Although Portuguese teachers, unlike their counterparts lack curriculum autonomy, they have full autonomy in the delivery of the subject-matter to be taught to the students. According to the interviewees, this management of the syllabus is carried out through the collective, that is, through coordination in the subject groups and curricular departments. We verified that in some schools the pedagogical council plays a role in this process, approving the curriculum management proposal, as for example between grades, and in other decisions the departments have full autonomy to manage the curriculum. Regardless of the curriculum practices of schools, we realize that they are carried out collectively, in contrast to the Ontario system. As previously noted, Canadian teachers have a high level of individual autonomy, resulting from the ministry's recognition in their ability to use *professional judgement* to make curriculum and assessment decisions based on the needs of the students. This is visible not only in the lack of obligation to make collaborative curriculum decisions with their peers, but also in the implementation of the curriculum itself, by the ability of selecting the specific expectations they consider necessary for students to achieve the overall expectations, which are mandatory for all students.

The analysis of the statements made by both the Portuguese and Canadian school principals, confirmed the principals' inherent responsibility in curriculum matters. As we have seen, in the Portuguese system, the RAAG (Portugal, 2008) determines that the school principal is the administrative and management body responsible for pedagogical matters which can explain the obligation for the principal to be the chair of the pedagogical council. We may also assume that this is the ministry of education's way of representing itself within the school on curriculum matters. However, we perceive, from the interviewees' statements, that Portuguese school principals have one of two positions in this matter: either they position themselves between the two decision-making levels, that of the ministry of education (which designs the curriculum) and of the pedagogical council (which makes decisions regarding implementation of the curriculum), distancing themselves from the decisions of both; or, they consider themselves as a member of the teaching staff, who happens to be the chair of the pedagogical council. This may lead the principals to uncritically accept the decisions of the collective of teachers over those of the interests of students, thus not exercising the powers granted to them by the ministry of education.

In Ontario, the data shows that school principals are considered to be *curriculum leaders* and have a high level of responsibility in terms of the curriculum, particularly in monitoring its implementation and compliance. The analysis of the statements leads us to conclude that, although they are agents of the board, school principals position themselves between the two levels of decision-making – that of the board and that of its teachers. Moreover, it was clear that due to this positioning, that Canadian school principals face constraints arising from the individual autonomy of teachers. While, on the one hand, they are responsible for the curriculum within the school, on the other hand they can

only intervene in teachers' decisions and their teaching practice when the teachers allow them to do so, since teachers are free to exercise their *professional judgement,* and to work in an isolated and independent manner. These circumstances show that Ontario teachers enjoy a high level of individual autonomy in contrast to those in the Portuguese system.

Concluding remarks

The aim of our study was to understand the level of autonomy of schools in a centralized (Portugal) and in a decentralized (Ontario, Canada) education system, starting from the Portuguese context, which prevailed until 2018 and underwent minor subsequent changes. Although, in the case of Portugal, the State has changed the legal framework regarding curriculum autonomy, we believe that the laws published since 2018 did not substantially change the definition of the curriculum, insofar as the ministry of education is still responsible for deciding on the curriculum. Moreover, the fact that the ministry of education allows schools to define up to 25% of the curriculum seems to us an attempt to mitigate its involvement and not exactly to change the curriculum autonomy that it granted to schools, as it continues to determine the terms and conditions under which schools can modify the curriculum.

Although many authors consider that autonomy is an aspect of decentralization and, therefore, is nonexistent in a centralized education system, we found that the issue of centralization/decentralization does not determine the level of autonomy of schools, as we did not find that schools in a decentralized system have more autonomy. Thus, the experiences of autonomy reported by the interviewees from both countries showed that there is no correlation between a centralized system and less autonomy. This leads us to conclude that school autonomy is not easily reduced to the dichotomy between centralized or decentralized contexts.

With regard to curriculum autonomy, we noticed that the perspectives of the interviewees differ, because their view of curriculum autonomy also differs, even though, in our opinion, this does not mean that it reflects the existence of more or less autonomy. The Canadian interviewees do not demand more curriculum autonomy. On the contrary, in their opinion they "have sufficient curriculum autonomy", while the Portuguese interviewees demand more autonomy and, at the same time, reject it due to the aforementioned constraints. This fact leads us to question to what extent these constraints are not a pretext for not appropriating the autonomy they already have.

According to some Portuguese interviewees, there is a reduced margin of autonomy, prescribed in legislation, but is conditioned by other regulations. This view leads us to admit that the overall legislative framework is flawed, as it overshadows the school's autonomy. In

other words, although the ministry of education grants some autonomy to schools, it also directly restricts it, because, in compliance with all of the regulations, in practice, it limits the decision-making power of schools. This duality leads us to admit that the autonomy granted by the ministry of education is not only limited, but also limiting, as it restricts and shapes the decisions that will be made by schools. We believe that by setting strict parameters that will govern the schools' decisions, the ministry of education grants the schools an autonomy that is at the same time controlled by the ministry of education, in that the school cannot deviate from the provisions of the law and, whenever it dares do something differently, it requires authorization. It is our view that we are facing an "autonomy under siege", as described by Morgado (2011), in that in the matters concerning the curriculum the school is still constrained by central administration, the latter not waiving its control over the structural decisions of the curriculum. The control over schools by legislative provision, often contradictory, brings us to Lima's stance on the matter (2011). However, we are bound to say that, although this autonomy is determined and shaped by the ME, the school, at an internal level, continues to have decision-making powers, through the "[...] pedagogical council [...] with proposals from the school principal [...] and from disciplinary groups or departments [...]" (DP-G), thus influencing the teaching and learning process.

We can admit the coexistence of contradictory logics regarding curriculum autonomy in the Portuguese education system, which do not exist in the Ontario system. While on the one hand the ministry of education establishes a national curriculum, which, in some people's views, is out of context from the reality of each school, on the other hand the possibility of the school being the creator of that curriculum is daunting and difficult to grasp and/or implement by the schools. Although curriculum autonomy is claimed, due to the specificity(ies) of each school, on the other hand it seems better to remain in the "comfort zone" and comply with the ministry of education's decisions. Again, we question to what extent autonomy is or is not desired.

Although the curriculum is designed by the respective governments and curriculum decisions are taken by different local entities – school boards and pedagogical councils – teachers, either collectively or individually, have different levels of autonomy. In the Portuguese case, teachers define some curriculum matters for their school, based on a national curriculum, while in the Canadian case teachers decide according to the needs of their students and to the curriculum guidelines issued by the board, in contrast to the Portuguese scenario in which the national curriculum is predominantly the same for all students in the school. However, the testimonials of the interviewees showed us that we cannot apply the idea of a uniform, ready-made, one-size-fits-all curriculum to the whole country (Formosinho, 1987), since schools make some, even if minor, decisions.

At the internal level, the collective autonomy of Portuguese teachers is sometimes a barrier to the development of greater curriculum

autonomy. In other words, the collective, through the curriculum departments and pedagogical councils, do not always make decisions regarding the curriculum with their students in mind, but rather in their own professional interests. This is not the case in the Ontario education system, since the school, as a whole, does not have autonomy; rather, each teacher has the autonomy to make decisions regarding the curriculum for their own students, which does not always translate into a model that is equitable, as much will depend on the ability of each teacher to manage and administer the curriculum.

Despite the contradictions, internal constraints felt by schools, and the will of teachers and schools to take on, more or less, curriculum autonomy, we can conclude that there is more local autonomy in the Ontario education system than in the Portuguese one. However, if we consider the pedagogical council as a local decision-making structure, even though Portugal's ministry of education still strongly controls the curriculum, then we can state that Portuguese schools enjoy more collective autonomy that Canadian schools. However, in this case, the data shows that Portuguese school agents are not taking ownership of this collective autonomy, conferred by laws, unlike the individual autonomy enjoyed by their Canadian counterparts.

When we analyze the collective and individual autonomy, we believe that the collective autonomy can create more problems to curriculum autonomy, since the responsibility does not rest on the teacher, on their singularity, but rather on the collective. Therefore, they have no perception of who is in charge of the decisions. In this case, we recognize that the perception of those school actors is that it is the others who decide, and, in this way, they are not held responsible for the decisions they make, which can be contradictory. Furthermore, some actors may consider that it is better not to have more autonomy because they disagree with the decisions made by the collective. For these reasons, we believe that the Portuguese education system rejects and does not take ownership of the autonomy already granted, as well as the possibility of a constructed autonomy.

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Notes

1 This study is a revised reading of the doctoral thesis titled *Organização e Autonomia das Escolas: Para uma Compreensão da Política da Administração Escolar em Portugal e no Canadá* (Oliveira, 2021).

2 Although Canada is a federation, the name "central services" is used to refer to the government of each of the ten provinces and three territories.

3 The centralized *policy tutelage* model, advocated by Bedard and Lawton (2000), involves central deliberation on the educational policy and the establishment of clear guidelines for its implementation, but gives flexibility to the Boards to adapt those central policies to the local conditions and envisages a role for the central powers in supporting local decision-making.

4 School body composed of 17 teachers, including the school principal and the curriculum department coordinators, representing the teachers of the respective subject groups.

5 During the interviews, the school principals use the concept of "centrality" and "centralization" as decision-making power in its broader sense, and not to mean "the government's decision-making power".

6 In particular, the class hours (45 or 50 minutes) and compensatory instruction time for compulsory subjects, as well as the supplementary offer and optional subjects.

7 Decree-Law No. 75/2008 of 22 April, in its current wording. Approves the autonomy, administration and management scheme of pre-school and basic and secondary education public school establishments (Portugal, 2008).

8 Decree-Law No. 41/2012 of 21 February. Amends the Teaching Career Statute of Early Childhood Educators and Basic and Secondary Education Teachers, approved by Decree-Law No. 139-A/90 of 28 April, as amended by Decree-Laws No. 105/97 of 29 April, 1/98 of 2 January, 35/2003 of 27 February, 121/2005 of 26 July, 229/2005 of 29 December, 224/2006 of 13 November, 15/2007 of 19 January, 35/2007 of 15 February, 270/2009 of 30 September, and 75/2010 of 23 June.

9 Twenty-five hours in pre-school education and 1st cycle of basic education and twenty-two hours in the 2nd and 3rd cycls of basic and secondary education.

10 Bedard and Lawton (2000) argue that, in their *administrative agency* model, *boards* act as implementers of central orders. In this case, we apply the model to the *board-schools* relationship, as it is the boards that execute the decisions of that local entity.

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