

# Public policies for school network planning in Portugal: changes in municipal responsibilities and choices\*

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## Abstract

The presentation of the Education charter in 2003 in Portugal as an instrument for future planning of school network represented the beginning of a different phase in public Education policies, seen as a necessary step towards the modernization of the primary school network. More than a decade later, at the start of a new cycle in public Education policies, a second phase of the reorganization of the public-school network began, with the revision of the Education charters. This paper aims to carry out a comparative analysis of these two periods, based on a qualitative research conducted in 34 municipalities in Central Portugal, featuring different realities, to identify the main differences and similarities and to determine the influence of territorial and human factors on the solutions adopted. It seems possible to conclude that new municipal actions have emerged that prioritize planning aimed at local specificities, in contrast to the previous approach, focused on compliance with central government stipulations.

**Keywords:** Public Education Policies. School Network Planning. Local Power.

## 1 Introduction

In the first decade of the 21st century, Portugal entered a new and remarkable era of public policies, carrying on the transformation and reformulation of the role

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of the State, which gained increased prominence from the mid-1980s, driven by the complete change in Portuguese society after the restoration of democracy in 1974 (BARRETO, 2000). In Education, and similar to what was happening in different geographies, concrete legislative initiatives were taken to transfer several competencies and responsibilities to municipalities, from which they had been completely deprived until then, aiming to bring political decisions closer to local realities and Education closer to local development dynamics (AJUNTAMENT DE BARCELONA, 1990) and, on the other hand, to respond to new educational demands and seek economic efficiency gains. One of the first dimensions of this transfer process was that municipalities were empowered to assume the management of their school network and the logistics to do so, for which they had to draft a strategic document articulating the diverse variables capable of contributing to better educational provision.

Thus, at the beginning of this century, the Education charter became the strategic document that embodies the local school network planning policies and forced Portugal, more than six decades after its implementation, to rethink the inadequate and poorly qualified public primary (and pre-school)<sup>1</sup> school network in consonance with the new geographical, demographic, socioeconomic, and educational realities (AZEVEDO, 2014). This reconfiguration involved two main actions: i) the closure of isolated and/or small-sized schools, which reflected the reality of the country in the first half of the 20th century (between 2005 and 2009 schools with fewer than ten students were closed, and from 2010 onwards, the number was set at 21 students); ii) the creation of school centers, designed in accordance with the needs and roles of the school in current times. The new buildings should integrate, desirably, the primary school and pre-school and present multifunctional facilities, aiming to improve the quality of educational facilities for students and teachers and their sharing with local communities (PORTUGAL, s. d.).

Due to this transformation, the spatial distribution of school buildings was reversed, making the school network less dispersed and, above all, their typology was reconsidered, to adapt them to the demands and functions that schools are expected to have today. Until then, and despite the radical transformation of the Portuguese society (BARRETO, 2000; PEREIRA, 2016), caused by the migration flows in the 1960s, the democratization in 1974 and the accession to the European Union in 1986, most of the primary schools remained practically unchanged since their construction during the *Estado Novo* regime<sup>2</sup> (MONIZ, 2018), through the

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<sup>1</sup> For students aged between 3 and 5 years (pre-school) and 6 and 9 years (primary school).

<sup>2</sup> An authoritarian, anti-parliamentary and corporative State regime in force in Portugal for 41 consecutive years, from the approval of the Constitution of 1933 until it was overthrown by the Revolution of 25 April, 1974 (ROSAS, 2015).

so-called *Plano dos Centenários*<sup>3</sup>, said to be the very beginning of the planning process of the Portuguese public-school network (CORDEIRO, 2014).

In this new conceptual and legislative framework, the revision of this strategic document became mandatory whenever the school network fell out of step with the principles, objectives and technical parameters contained in the rules governing municipal planning, having the ME, together with the municipalities, to assess the need for an update every five years. The purpose was to stabilize the scope of future planning of this document on the management of public schools, adapting it to the new demographic realities resulting from the gradual decrease in birth rates and consequent general aging of the population, and to ensure the appropriate planning of the school network (SANTOS; DUARTE; MARQUES, 2019).

Today, at a time when the transfer of competencies and responsibilities from the central to the local government is reinforced and accumulated experiences are updated, which marks the beginning of a new cycle of public policies, called second-generation public policies (DIAS; SEIXAS, 2020), the Education charter becomes even more important. The new legal framework confirms the competencies of municipalities in planning the school network and maintains this strategic document as an instrument for prospective planning of school buildings and facilities, putting an end to its arbitrary revision and making it mandatory every ten years. In the previous regulation, it depended on municipal initiative, now less pressured by the various factors that served as catalysts for the first generation Education charter (such as forced school closures and access to European funds), and could be done gradually, according to the needs of each municipality. This transformation represents the affirmation of the Education charter as an effective territorial management instrument and a reference framework for public policies. It is also expected to contribute to the definition of a political strategy for local development.

In line with this, the new legal scheme expands the powers of municipal bodies in school building conservation and maintenance, extending them to all levels of Education. While until now, they were only responsible for the conservation and maintenance of preschool and primary school buildings, which formed the municipal school network, they now assume responsibility for the other Education levels (middle and secondary schools<sup>4</sup>). At a time when the financial resources needed to deal with these new competencies are discussing, the Education charter is considered a political instrument and an essential tool in the negotiation

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<sup>3</sup> A national program to build primary school, launched in 1940.

<sup>4</sup> For students aged between 10 and 14 years (middle school) and 15 and 17 years (secondary school).

process at the different levels of decision-making. It is of particular relevance on issues related to the middle and secondary schools, which are more demanding regarding material and human resources and, until now, under the responsibility of the central government.

Therefore, more than a decade after the conclusion of the assessment and homologation of the first-generation Education charters, which, overall, occurred between 2006 and 2010, in a very different political and legislative framework, a new planning period of the public-school network was initiated in Portugal. More than responding to a legal imperative, the second-generation Education charter is an opportunity for municipalities to: i) assess the followed strategy and the results achieved in the first phase, ii) consider the changes that have occurred in the educational, demographic, and socioeconomic dynamics, iii) design new lines of development and iv) make the necessary adjustments to overcome the adversities found and improve the quality of public Education. Furthermore, the second-generation Education charter is an opportunity to apply the new curriculum guidelines, provided by official documents that seek to define the desired profile for students at the end of compulsory schooling (MARTINS, 2017).

Although a brief comparative analysis of the two periods of the Education charter, separated by more than a decade and a half, shows the absence of substantial differences in terms of objectives, subject, and content in the rules governing it, the political and demographic conditions that underlie the development of the reorganization of the school network in the first phase have changed substantially. Recently, Education planning has inevitably lost much of its prominence on the national political agenda, due to the strong investment of the National Strategic Reference Framework (NSRF) 2007-2013 in the requalification of schools in the first-generation Education charter, solving the priority problems, but also due to the shrinking funds available in the Portugal 2020, responsible for an undeniable slowdown in European funding for school facilities. Unlike the NSRF 2007-2013, which prioritized the material component of Education, the Portugal 2020 program was more concerned with the intangible component of Education, particularly with educational success. At the same time, the effects of the low birth rate on school demand worsened (MENDES, 2018). While in the first phase, they specially affected preschool and primary school, in this second phase, the effects were felt the most in the middle and secondary schools, resulting in new needs for reorganization of the school network. More recently, due to the consolidation of the transfer of competencies and responsibilities from central to local power, the school planning duties of municipalities increased.

The above changes inevitably set different paces, characteristics, and consequences for this new moment of planning in Portuguese public schools. In essence, the main differences can be summarized in six levels: i) at the conceptual level, it reveals a greater concern for the defense of local interests than for the fulfillment of national criteria, following the logic of respect for the diversity of realities advocated by local authorities, although they are still unable to ignore the guidelines issued at the central level, such as the minimum number of students required for the operation of primary schools; ii) at the organizational level, it is more exposed and welcomes the contributions and results of actions and works of partners and civil society; iii) at the strategic level, it is less ambitious and often corresponds to minor adjustments to the proposals for reorganizing the school network presented in the first-generation Education charter; iv) at a technical level, it takes over the planning of public middle and secondary schools; v) at an operational level, and although the concept of school center that guided the previous school reorganization is maintained, it adopts as the most frequent solution the integration of pre-school and primary school in the middle and secondary schools, as a way to prevent them from being emptied or even closed; vi) at a financial level, it has a European financial envelope modernizing schools that is much smaller and far below real needs.

These changes occur at a time when the assumption of competencies and responsibilities by the Portuguese municipalities and the operationalization of local policies, shaped and strengthened, within the framework of the plans described, have created the conditions to truly change the relation of people and institutions with the design and impact of decisions. Closing or opening schools and defining the conditions for children and young people who spend a lot of time in school and must also have more extensive and diversified educational experiences were, for many territories, the reason and the opportunity to involve the community, especially families. Since then, dialogues have sparked that have remarkably contributed to an increased general interest in educational issues, often bringing them to the center of political and electoral debate and, consequently, to the construction of knowledge.

At a time when the design and implementation process of the first-generation Education charter has been completed, and a new cycle has started for planning the Portuguese public schools, with the revision of the Education charter (second generation), this paper follows from previous research (SANTOS; CORDEIRO; ALCOFORADO, 2021) to present the results of the assessment of the: i) differences and similarities between the two phases of the reorganization of Portuguese public-school network and ii) impact of the heterogeneity of existing territorial dynamics in the design of local planning strategies of schools. The first part

analyses the response of municipalities to the obligation to revise the Education charter and identifies and describes the reorganization solutions adopted in the second generation. The second part seeks to interpret the main changes in municipal logic of action in the second generation and compare the positions of the different territories when drafting the proposal for intervention in the school network in the two generations of the Education charter.

## 2 Methodology

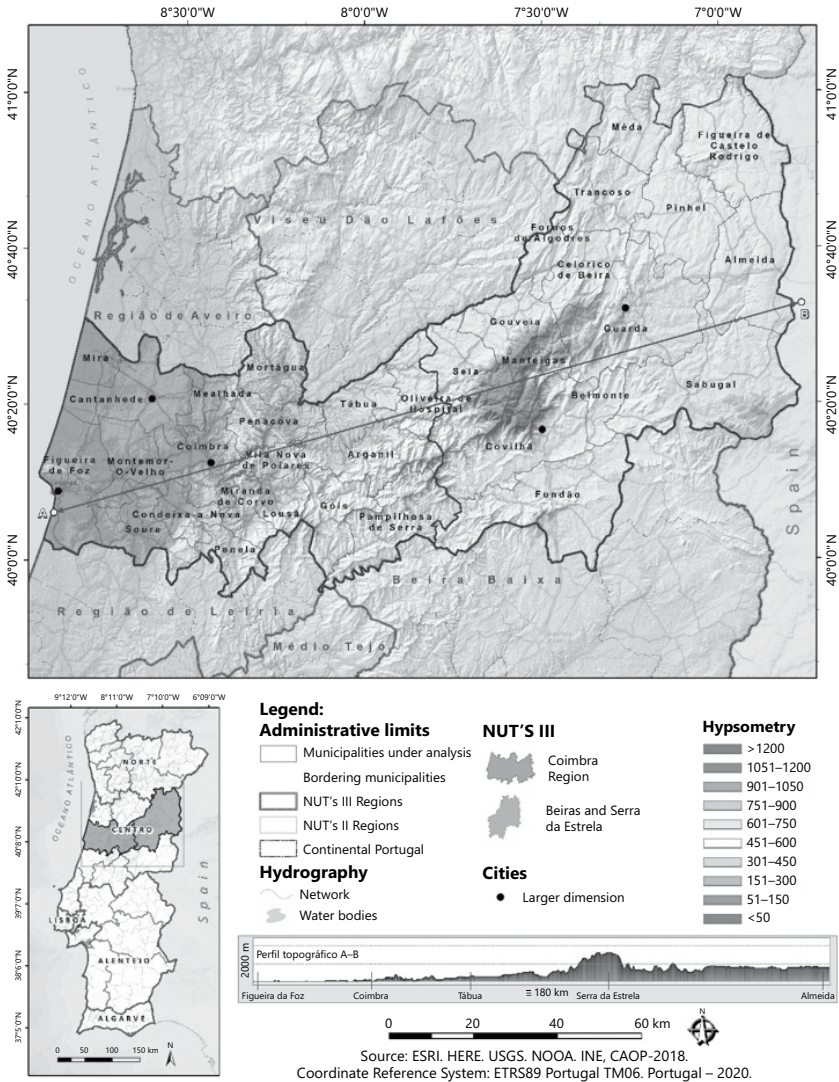
This research was based on a qualitative investigation conducted through the documentary analysis of strategic planning documents in the field of Education (Education charters and municipal strategic Education plans). First, we interpreted the planning strategies developed within the proposals for reorganizing the school network presented in the second-generation Education charter, followed by a comparative analysis with the solutions for the reorganization of the school network contained in the first-generation Education charter.

To ensure the necessary comparative analysis of the two Portuguese public schools planning stages, the two intermunicipal communities (IMC)<sup>5</sup> selected in the previous work (SANTOS; CORDEIRO; ALCOFORADO, 2021), the Coimbra Region IMC (19 municipalities) and the Beiras and Serra da Estrela IMC (15 municipalities), both part of the Central Region of Portugal, were maintained (Figure 1). These communities represent many of the current problems in Portuguese territory. Forming a continuous band that extends from the coastal line to the border with Spain, they present a diversified morphology – from the coastal shelf to the higher-altitude regions of the country – and reflect one of the biggest problems that Portugal faces, the concentration of population in the sector closest to the ocean and the aging and depopulation of the interior sectors (littoralization). It should be noted that only 7 of these 34 municipalities are not classified as low-density territories, all integrated within the Coimbra Region IMC.

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<sup>5</sup> They correspond to the level III administrative units of the Nomenclature of Territorial Units for Statistics, a hierarchical system of dividing territory into regions, which is subdivided into three levels (Pordata, s. d.).

Figure 1 - Territorial framework of the intermunicipal communities under analysis



Source: Prepared by the author, 2020

### 3 Municipal school network planning strategies

Despite the profound change in the public-school network brought about by the first-generation Education charter, the appropriation of this legal requirement

by municipalities was not uniform regarding planning and implementation. The first work (SANTOS; CORDEIRO; ALCOFORADO, 2021)<sup>6</sup> identified three solutions for the reorganization of the school network: i) the central solution, where the proposals to reorganize the school network followed the criteria of rationality and quality imposed by the central State and proposed the closure of isolated and/or small-sized schools and the concentration of the school population in school centers; ii) the conciliation solution, where the proposals to reorganize the school network sought to articulate the premises determined by the national political authority with the sense of respecting the territorial specificities defended by the local power and proposed to create school centers in some sectors of the municipal territory and maintain the old primary schools in others; iii) the municipal solution, where the proposals to reorganize the school network underestimated the guidelines defined at the central level and responded, above all, to the demands of local actors, without proposing structural changes in the typology and geographical distribution of the school network.

Today, after the recent decentralizing legislation adopted by the Portuguese government aiming to strengthen the transfer of educational competencies from central to local power, taken in agreement with predominant European public Education policies and with general Education mindset (BARROSO, 2017, 2018a, 2018b; BATISTA, 2016; FERNANDES, 2005; FREITAS, 2015; LIMA, 2015; RIBEIRO, 2018; SOBRAL, 2018), the municipalities are again confronted with the obligation to implement the Education charter. As a result, they have the opportunity to rethink the local school network planning strategies adopted in the previous phase, considering the changes in educational, demographic, and socioeconomic dynamics, as well as in national and local Education policy. Furthermore, they can effectively include these reorganization proposals in a fully-fledged territorial development strategy.

In this new phase, and exactly as in the first moment of planning of the Portuguese public-school network of this century, there is much heterogeneity in the way that municipalities have incorporated this legal provision, even in territories with comparable physical and human characteristics. This occurred despite the wide recognition of the relevance of this strategic document within the adoption of the new competencies, foreseen as mandatory from 2021 onwards, and the establishment of a common benchmark to be considered in its elaboration.

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<sup>6</sup> Developed, in turn, following previous research carried out in 14 municipalities in the Central Region of Portugal between 2009 and 2011 (CORDEIRO; MARTINS, 2013; CORDEIRO; MARTINS; FERREIRA, 2014).



A first idea that can be extracted from the analysis of the 34 municipalities under study is that, despite the legal obligation, most municipalities (20) have not yet started to revise their Education charters or are still in an embryonic stage of the process (Table 1 and Figure 2). Contrary to the ingrained idea that municipalities with more favorable demographic and socioeconomic contexts are more proactive and more concerned with the quality of the school network, this option was followed in the largest city in the Coimbra Region IMC, as well as in two other municipalities not classified as low-density territories.

**Table 1** - Municipal logic of action in the two phases of the elaboration of the Education charter

IMC	Municipalities	First generation		Second generation	
		Type of proposal	Degree of implementation of the proposal	Revision	Type of proposal
Coimbra Region	Arganil	Central	Partial-medium	No	-
	Cantanhede	Central	Partial-low	Yes	Conciliation
	Coimbra	Conciliation	Partial-low	No	-
	Condeixa-a-Nova	Central	Partial-medium	No	-
	Figueira da Foz	Conciliation	Partial-low	Yes	Conciliation
	Góis	Municipal	Total	Under development	-
	Lousã	Municipal	Total	Yes	Central
	Mealhada	Central	Partial-high	Yes	Diagnosis
	Mira	Conciliation	Total	No	-
	Miranda do Corvo	Conciliation	Partial-medium	No	-
	Montemor-o-Velho	Central	Partial-low	Yes	Central
	Mortágua	Central	Total	No	-
	Oliveira do Hospital	Municipal	Partial-medium	Yes	Conciliation
	Pampilhosa da Serra	Central	Total	No	-
	Penacova	Central	Partial-medium	No	-
	Penela	Central	Total	Yes	Diagnosis
	Soure	Conciliation	Total	Under development	-
	Tábua	Central	Total	Yes	Diagnosis
Vila Nova de Poiares	Central	Total	No	-	

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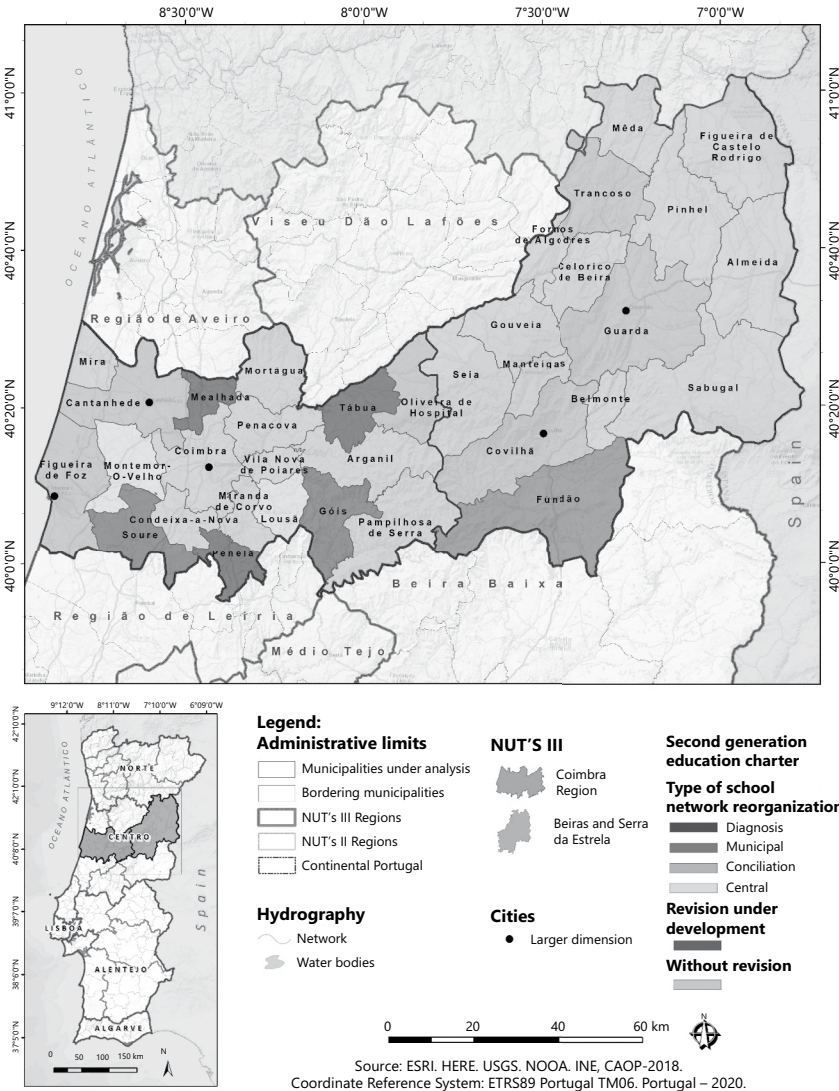
Continuation

IMC	Municipalities	First generation		Second generation	
		Type of proposal	Degree of implementation of the proposal	Revision	Type of proposal
Beiras and Serra da Estrela	Almeida	Central	Partial-high	No	-
	Belmonte	Central	Total	No	-
	Celorico da Beira	Central	None	No	-
	Covilhã	Municipal	Partial-medium	Yes	Conciliation
	Figueira de Castelo Rodrigo	Central	Partial-high	No	-
	Fornos de Algodres	Central	Partial-high	No	-
	Fundão	Municipal	Total	Yes	Municipal
	Gouveia	Central	Partial-medium	No	-
	Guarda	Conciliation	Partial-low	Yes	Conciliation
	Manteigas	Municipal	Total	No	-
	Mêda	Conciliation	Total	No	-
	Pinhel	Conciliation	Total	No	-
	Sabugal	Central	Partial-high	No	-
	Seia	Conciliation	Partial-medium	No	-
	Trancoso	Central	Partial-medium	Yes	Conciliation

Key: None - 0%; Partial-low - 1-49%; Partial-medium - 50-89%; Partial-high - 90-99%; Total - 100%.

Source: Prepared by the author, 2020

Figure 2 - Municipal logic of action in the second-generation Education charter



Source: Prepared by the author, 2020

Among the territories that chose not to initiate the process, we find eight of the eleven municipalities that in the first-generation Education charter followed the State's criteria of rationality and quality and closed the isolated and/or small-sized schools and concentrated the school population in school centers (central type

intervention strategy)<sup>7</sup>. Although existing research is insufficient to cover the diversity and complexity of the dimensions in the municipalities' choices, empirical evidence seems to show that these municipalities have fewer needs to change because, almost a decade after the implementation of the reorganization process, the school supply is perfectly adequate to the school demand. Two factors have fundamentally contributed to this stability: first, the reorganization of schools into school centers in the first phase, for which substantial investments were made in infrastructure and logistics, which can hardly be replicated; on the other hand, the expected growth of the school population, even though the rate of decline was higher than predicted in the development forecasts in most municipalities, a reality that required permanent monitoring of school dynamics.

Within this group all the municipalities are classified as low-density territories, making us believe that the more dynamic territories in demographic and socioeconomic terms find it more difficult to comply with the national guidelines and carry out the reorganization of schools according to the school center logic, as a result, first, of more political and community opposition from groups of citizens and, later, of the very dimension of the infrastructure network, which increases the investment needed for such a reorganization. On the other hand, the reorganization of the school network in many low-density territories boils down to concentrating the school population at all levels of Education in a single Education establishment.

A second idea to be drawn from the analysis of the sample, composed of 34 municipalities, is that while 14 territories have proceeded with the revision of their Education charters, only 12 have completed the process. The following section will focus precisely on these territories, to draw conclusions about the second stage of planning of the Portuguese public-school network. The analysis of these cases highlights the fact that in this second stage, in which the school network shows some very different shortcomings, some municipalities have fulfilled their legal obligation to promote the revision of their Education charter, even though they did not need to intervene in the school network. Such were the cases of the three remaining municipalities that followed the criteria of rationality and quality adopted by the State in the first-generation Education charter and closed the isolated and/or small-sized schools and concentrated the school population in school centers (central type intervention strategy). Having a perfectly stabilized school network, these municipalities aim to formally ensure that the school network remains adequate to the needs of the evolving school population. This is a model

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<sup>7</sup> Although 19 municipalities presented central type reorganisation proposals in the first-generation education charter, only 11 fully or almost fully (partial-high) implemented them.

of local policy management in which municipalities assume their responsibilities in the field of Education. As only one of these municipalities is not classified as a low-density territory, we reinforce the idea that in more dynamic municipalities in demographic and socioeconomic terms, there is greater difficulty in making deep interventions in the school network.

In these territories, the Education charter focuses on updating the diagnosis of school supply and demand and the development forecasts, and also on programming the requalification interventions necessary to guarantee the quality of the municipal school network. In addition, it should also focus on the stabilization of a systematic monitoring of the dynamics of the Education system that allows the timely identification of deviations from what was planned and the adoption of corrective measures, taking care that the objectives initially established can be achieved. We have named “diagnosis” this type of reorganization of the school network. It is limited to ensuring the exercise of municipal responsibilities in the conservation and maintenance of school buildings and does not establish medium and long-term gradual planning objectives, one of the legally defined objectives of the Education charter.

However, the forces and interests involved in the process of defining, implementing, and coordinating the local Education policy and the municipal school network planning strategy, are much broader and more diverse than the educational action in these three territories. The analysis of the remaining nine municipalities shows that, once again, the three patterns of behavior characterized in the previous work are maintained (SANTOS; CORDEIRO; ALCOFORADO, 2021): the central, the conciliation and the municipal solutions. The different positions taken in these territories are related to demographic and socioeconomic factors and, above all, to the dynamics of local political action, resulting from the protagonism and the capacity of influence of different partners. These factors overlap the overall policy framework of guidelines established at national level for the educational provision.

## **4 Evolution of municipal decisions on the planning of the Portuguese school network**

Although the analysis of the proposals for reorganization of the school network presented in the second-generation Education charters, in all the municipalities under study, shows that the reorganization solutions identified in the first work (SANTOS; CORDEIRO; ALCOFORADO, 2021) are maintained, the municipal logics of action have changed substantially. While in the first-generation Education

charter most municipalities opted for a central type intervention strategy (19 out of 34 municipalities), in this second planning stage most opted for the conciliation type reorganization solution (6 out of 9 municipalities). This was the option of the second and third-largest cities in the Coimbra Region IMC. The central type of intervention strategy was adopted in two municipalities, where the last municipality not classified as low-density territory is included. As in the first phase, the municipal type of reorganization solution was the least representative (one municipality) and remained exclusive to low-density territories.

The transformation described above, which is an evolution in the school network planning, shows that in this second phase the municipalities are less concerned with meeting centrally defined school planning criteria (central type intervention strategy) when designing the reorganization solution and seek to be closer to reality and to what they intend to do or can implement. The available data show that there are three fundamental reasons for the emergence of this new logic of municipal action: i) the municipalities' awareness of the difficulty of implementing a central type intervention strategy, due to the resistance from local communities and to the exorbitant funds involved; ii) the ME's greater flexibility in assessing the application of the rules established in the reorganization proposal; iii) and, above all, the change in the municipalities' access conditions to European funding for the works to be carried out.

In the first phase, the ME established as an essential requirement for access to financial resources the approval of the Education charter, which was directly dependent on compliance with the national guidelines on schools to be closed and on typology, size, and characteristics of the schools to be created in the proposed reorganization of the school network. As a result, reorganization solutions in many municipalities were carried out with the sole purpose of creating the conditions necessary to obtain a favorable opinion and not necessarily to implement them effectively. These proposals to reorganize the school network provided for the creation of numerous school centers, whereas the plan was to proceed with priority projects only, usually located in highly populated areas. It should be noted that the approval of the Education charter did not mean that all proposals made in the document were co-financed. Investment priorities were set according to the terms defined in the respective specific regulations.

In this second phase, in which European funds are fewer and far below the real needs, the establishment of priorities for intervention in school buildings and educational facilities and the investment to be co-financed depends solely on the competent government departments, in articulation with regional entities:

Regional Coordination and Development Commissions and the IMC. The new legal framework stipulates that preference must be given to five actions: i) eliminate educational shortcomings, to ensure compliance with compulsory schooling; ii) intervene in schools whose state of conservation, as well as use and comfort indicators are inadequate for the qualitative development of their educational projects; iii) remove potentially harmful materials to human health from school buildings; iv) install laboratory, sports or other equipment not available in schools in operation; v) rationalize the school network.

The comparative analysis of the proposals for reorganization of the school network elaborated by these municipalities in the two generations of the Education charter identified distinct behaviors, making it possible to divide the municipalities into two groups (Table 2). The first group is formed by the territories that, during this process, restructured the guiding principles of their local educational policy and action and adopted a different strategy when elaborating the intervention proposal in the second-generation Education charter (five municipalities). The second group is formed by the territories that, during this time, maintained the objectives and priorities of their local educational project and assumed an identical strategy in the two phases of preparation of the reorganization solution (four municipalities).

However, when we compare the local school network planning strategy designed in the second phase with the behavior adopted when implementing the proposal for reorganizing the school network drafted in the first phase, we realize that the reality is far more complex. Contrary to what we would be tempted to think, in the first group, not all the municipalities took a different position and, similarly, in the second group, not all municipalities maintained the logic of action. In fact, in the first group, only one municipality took the opportunity to decide differently from the position adopted when implementing the first intervention proposal. Although the remaining municipalities (four) outlined a different reorganization solution in the second-generation Education charter, in reality, they only adapted the strategy now defined to the logic of action shown when implementing the reorganization proposal presented in the first-generation Education charter and relapsed into the previous behavior.

In turn, in the second group, one municipality assumed a different position in the second-generation charter, even though it had elaborated an identical intervention proposal in the two phases, since it did not comply with the reorganization solution foreseen in the Education charter in the first phase. In this group, this was the only territory that, in the first-generation Education charter, rethought its strategy

**Table 2** - Comparative analysis of the behaviors adopted in the two phases of elaboration of the Education charter

IMC	First generation				Second generation		Behaviour in relation to the logic adopted in the implementation of the proposal presented in the 1st generation EC
	Municipalities	Type of proposal	Degree of implementation of the proposal	Revision	Type of proposal	Behaviour in relation to the proposal submitted in the 1st generation EC	
Coimbra Region	Cantanhede	Central	Partial-low	Yes	Conciliation	Different strategy/ Restructure	Repeated
	Figueira da Foz	Conciliation	Partial-low	Yes	Conciliation	Identical strategy/ Maintenance	Repeated
	Lousã	Municipal	Total	Yes	Central	Different strategy/ Restructure	Recasting
	Montemor-o-Velho	Central	Partial-low	Yes	Central	Identical strategy/ Maintenance	Recasting
Beiras and Serra da Estrela	Oliveira do Hospital	Municipal	Partial-medium	Yes	Conciliation	Different strategy/ Restructure	Repeated
	Covilhã	Municipal	Partial-medium	Yes	Conciliation	Different strategy/ Restructure	Repeated
	Fundão	Municipal	Total	Yes	Municipal	Identical strategy/ Maintenance	Repeated
	Guarda	Conciliation	Partial-low	Yes	Conciliation	Identical strategy/ Maintenance	Repeated
	Trancoso	Central	Partial-medium	Yes	Conciliation	Different strategy/ Restructure	Repeated

Source: Prepared by the author, 2020



between the moment of elaboration and implementation of the reorganization proposal. The other municipalities (three) maintained their strategy in these two phases and relapsed, again, to the previous behavior in the second-generation Education charter. In the group of nine municipalities under analysis, these were the only three that did not change their logic of action throughout the process. They resisted against the complexity and multidimensionality of local reality, the demographic transformation that occurred, and the development of the national and, above all, local political and conceptual framework, caused by ideological changes or simply by a restructuring of the responsible political and technical teams. This inaction in educational practices has resulted, in one of the territories, in the absence of any structural intervention to requalify its school network in the two planning phases of the Portuguese public-school network.

There are, therefore, two distinct types of behavior: i) the reformulation behavior, in which municipalities took advantage of this new planning cycle of the national public-school network to rethink the position of the local power on the planning of the school network and effectively provide an alternative solution to reorganization than the one adopted when implementing the proposal for reorganizing the school network presented in the first-generation Education charter (two municipalities); ii) the repeated behavior, in which municipalities did not take advantage of the revision of the Education charter to reformulate their local educational project and resumed the intervention strategy followed when the proposal for reorganizing the school network outlined in the first phase was effectively implemented (seven municipalities). In the former, the municipalities respected the technical-political objectives defined at the central level for the requalification of the Portuguese public schools, while in the latter the municipalities prioritized “the demands of the mosaic of local political and social actors” (CORDEIRO; MARTINS, 2013, p. 352) and maintained many of the old primary schools rather than accepting the total reform proposed by the ME.

In the genesis of the repeated type behavior, we find a trend that suggests different assumptions between the municipalities that develop at the pace of coastal regions and the municipalities of low density. In the former, this option appears to be due solely to political reasons, which are not in line with their demographic and socioeconomic dynamics, requiring better quality schools and drivers of local development. In the latter, the low-density municipalities, it appears to be more related to territorial factors, anchored in the recognition of their specificities which determine the application of differentiated measures to counteract the dominant regressive territorial dynamics. This search for adapted solutions aims to respect the different demographic and socioeconomic dynamics and to curb the concentration of the population in the urban centers and the growing desertification

of rural sectors. This is based on the assumption that in low-density territories schools are structuring facilities for urban planning according to social cohesion and, therefore, the decision to close them should not be based only on quantitative criteria, but also on the heterogeneity of the national territory (MARQUES *et al.*, 2020; PISCO, 2005).

Regardless of the reasons that supported the decisions of these municipalities, the fact is that the followed educational model, based on a territorialist paradigm, focused on the valorization of the local interests and commitments to achieve an integrated and sustained development (PACHECO, 2012), drives strong intra and inter-municipal asymmetries when it comes to the quality of educational facilities. Naturally, it is in the municipalities where the contrast between the center and the periphery are more pronounced that its effects are most evident and should be worth further reflection.

## 5 Final considerations

While it is true that for more than half a century Portugal has been unable to mobilize sufficient funds to modernize its primary school network, it is also clear that in the first twenty years of the 21st century it was able to remedy its main shortcomings and implement two reorganizations of the school network.

Although in the ten years that separate these two moments of public-school network planning Portugal has undergone significant changes in political and demographic conditions, which have given the second-generation Education charter its distinctive characteristics, the resistance of municipalities to the reorganization of their schools and the type of school network planning adopted have not undergone significant changes. There has been, however, a change in school planning which reveals the emergence of new areas of interdependence between central and local authorities, with visible effects on the quality of public Education and equal opportunities. Contrary to what happened in the first-generation Education charter, where municipalities were concerned with incorporating the technical guidelines imposed by the ME into their local intervention strategies, in this second phase most territories did not comply with the planning criteria defined at the central level and chose to circumvent, overlap, or even ignore the national guidelines.

The existence of different practices shows that the reorganization of the school network is a complex process dominated by various logics of action that depend on the diverse demographic, socioeconomic, educational, financial, and political contexts, impacting the forces and influences established among the various local

agents and between the municipalities and central powers. Although the results of this research have not made it possible to establish a direct relationship between the type of school network reorganization solution adopted and the variable that most influences it, it is clear that, when defining the intervention strategy, the financial and political factors prevail over demographic, socioeconomic, and educational aspects.

Despite the aforementioned constraints and the long way to go, it seems forthright to accept that in this second phase of the public-school network reorganization, Portugal has taken a further step towards eliminating territorial and socioeconomic inequalities in the access to quality public Education and consolidating the public-school network planning policies and the role of municipalities in their implementation. It would also be desirable to strengthen the capacity to foster genuine community-conscious participation in the most important decisions concerning Education. However, it seems that, in most cases, the intervention of partners and civil society is limited to the defense of immediate and private interests.

For the first time in Portugal, the municipalities have been granted some autonomy in decision-making regarding the school network planning. Albeit still under strong central regulation, it constituted one of the most significant decentralization experiences in the country.

At a time when the first moment of planning the Portuguese public-school network is completed and a new cycle begins, it is of utmost importance to assess the evolution between these two periods. This assessment is twofold: it allows understanding how the transfer of competencies and responsibilities in Education management is evolving and serves as an example for other countries when decentralizing policies and handing over to the local authorities the possibility to plan the school network.

The different positions taken in these territories are related to demographic and socioeconomic factors and, above all, to the dynamics of local political action, resulting from the protagonism and the capacity of influence of different partners. These factors overlap the overall policy framework of guidelines established at national level for the educational provision.

## **Políticas públicas de planeamento da rede escolar em Portugal: evolução das responsabilidades e opções municipais**

### **Resumo**

*Em Portugal, a apresentação, em 2003, da carta educativa como instrumento de planeamento prospetivo da rede escolar representou o início de uma fase diferente nas políticas públicas de Educação, que permitiu a requalificação da rede escolar pública do 1.º ciclo do Ensino Básico. Mais de uma década depois, no início de um novo ciclo nas políticas públicas de Educação, arranca um segundo momento da reorganização da rede escolar pública, com a revisão das cartas educativas. O presente artigo propõe-se, com base numa investigação qualitativa desenvolvida em 34 municípios da Região Centro com realidades distintas, realizar uma análise comparativa destes dois períodos, identificando as principais divergências e convergências e avaliando a influência dos fatores territoriais e humanos nas soluções adotadas. Parece possível concluir o aparecimento de novas lógicas municipais de ação, que privilegiam um planeamento direcionado para a defesa das especificidades locais em detrimento do anterior planeamento centrado no cumprimento das determinações do Estado central.*

**Palavras-chave:** Políticas Públicas de Educação. Planeamento da Rede Escolar. Poder Local.

## **Políticas públicas para la planificación de la red escolar en Portugal: cambios en las responsabilidades y elecciones municipales**

### **Resumen**

*La presentación de la carta de educación en 2003 en Portugal como un instrumento de planificación prospectiva de la red escolar representó el comienzo de una fase diferente en las políticas públicas de Educación vistas como un paso necesario para la modernización de la red escolar primaria. Más de una década después, al inicio de un nuevo ciclo en las políticas públicas de Educación, se ha iniciado una segunda fase de reordenación de la red de escuelas públicas, con la revisión de las cartas educativas. Este artículo tiene como objetivo realizar un análisis comparativo de estos dos períodos a partir de una investigación cualitativa realizada en 34 municipios del centro de Portugal, con realidades diferentes, para identificar las principales diferencias y similitudes y determinar la influencia de los factores territoriales y humanos en las soluciones adoptadas. Parece posible concluir que han surgido nuevas acciones municipales que priorizan la planificación dirigida a las especificidades locales en contraste con el enfoque anterior, centrado en cumplir con las estipulaciones del gobierno central.*

**Palabras clave:** Políticas Públicas de Educación. Planificación de la Red Escolar. Poder Local.

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