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## INTERNATIONAL & COMPARATIVE EDUCATION | RESEARCH ARTICLE

# Management model, leadership and autonomy in Portuguese and Spanish public schools: A comparative analysis

Mireia Tintoré<sup>1\*</sup>, Joaquín Gairín<sup>2</sup>, Ilidia Cabral<sup>3</sup>, José Matías Alves<sup>3</sup> and Rosário Serrao Cunha<sup>3</sup>

**Abstract:** The organisation of K-18 schools and the management function are similar in Portugal and Spain, although, in recent years, Portugal has surpassed Spain's educational results. Based on the last international reports, this article compares the educational systems of both countries considering some variables related to the management model: (i) the general organisation of education in these stages, (ii) the characteristics of the teaching profession, including the process of recruitment and selection of teachers and principals, and (iii) the level of school autonomy and the type of management and leadership. Findings corroborated the existence of structural proximity in the governance of schools within the framework of a management model that is both centralized and participatory. However, there are differences in the permanency of educational laws, the duration of compulsory education, the grouping of schools, and the requirements to be a teacher. We conclude that the policies undertaken by Portugal to improve education (such as the extension of compulsory schooling, legislative stability, or the rethinking of the internal organization of schools) are succeeding and can serve as an example for Spain. Both countries could help principals become leaders for learning and improve their autonomy to favour changes in education.

**Subjects:** International & Comparative Education; Primary/Elementary Education; School Leadership, Management & Administration; Secondary Education; Education Policy & Politics

**Keywords:** education policy; school leadership and management; school autonomy; centralization; participation

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## 1. Introduction and theoretical foundations

The relevance of educational leadership and management is well established in the literature (Jinlong et al., 2019), and a great variety of studies provide sound data relating leadership to school effectiveness (e.g., Day et al., 2010; Leithwood et al., 2004; Pont et al., 2008; Robinson et al., 2009).

Policymakers, governments, groups of researchers, and other stakeholders of the school communities, are also devoting resources to raising awareness about the crucial role of school leadership (e.g., The Wallace Foundation, La Caixa Foundation, British Educational Leadership and Administration Society, Porticus Foundation, Portuguese and Spanish School Administration Forums, CRIEDO, Red AGE or Project EDUgest of Ramiro de Azevedo Foundation).

In this context, a group of researchers from Portugal and Spain began a project called EDULID—Iberian Observatory of Educational Leadership. One of the main goals of this observatory was to collect scientific and practical knowledge to improve leadership practices in the Iberian Peninsula, which included performing comparative studies and defining the Iberian framework for effective educational leadership. At the basis of EDULID laid the idea of promoting concerted actions for principalship improvement, aligning principals, school communities, researchers, and government representatives. These actions must ponder the contextual variables that can be improved and principals and school-specific variables (Matías Alves et al., 2020).

Moreover, EDULID aims to offer data and reflections on educational governance in Spain and Portugal, contribute to decision-making by those responsible for education, and influence educational policies.

Hence, knowing the educational context of these two nations, the educational policies, and the organisational leadership and management policies are essential to design interventions appropriate to the countries and create effective communication with policymakers and practitioners. To date, only a few studies have compared education in Spain and Portugal, and these have focused on the student outcomes or the socioeconomic aspects of education (Heisig et al., 2020; López-Rupérez & García-García, 2020). However, a comparative analysis of the school management model in these countries (comprising school management and school leadership) is lacking, and we will try to fill the gap with the current investigation.

The concepts cited before are different but are sometimes used as if they were the same. *School management*, or *educational management*, refers to the technical aspects of organising schools and exerting power within a hierarchy (Mullins & Christie, 2016); *educational leadership* refers to relational aspects and exerting an influence (Connelly et al., 2017). Today, educational management has a negative connotation because sometimes it is related to control, dominance, rigid structures and an exaggerated focus on efficiency. On the contrary, educational leadership is more valued and studied (Bennis, 2007; Day & Antonakis, 2011) because it is focused on institutional aims and purposes and is associated with motivation, change, improvement, autonomy, democracy, the creation of relationships, or the development of collaborative processes (Connelly et al., 2017). Sometimes, principals centred only on management are called “bureaucratic leaders”, adding more confusion to these notions.

Research has shown that leadership is a crucial factor for school improvement (Grissom et al., 2021; Leithwood et al., 2020; Pont et al., 2008), but also that it must be accompanied by good management (Briggs & Wohlstetter, 2003) and the possibility of autonomy (Dou et al., 2017). Some authors consider effective leadership as a prerequisite for a successful school autonomy reform (Briggs & Wohlstetter, 2003), and the Organization for Economic Co-Operation and Development (2020) states that autonomy in decision-making is a necessary step to guarantee effective leadership and influences the school organization “in a substantial but indirect way” (Dou et al., 2017, 961). For all of the above, if we want to improve our educational systems, we must give relevance

to these three constructs that are critical levers for the governance of learning institutions (Organization for Economic Co-Operation and Development, 2020).

Another element that can cause disorientation is the wide variety of existing leadership models. In these pages, we will refer to some of them, which require some definitions. In the first place, the words “educational leadership” or “educational leaders” are related to the people who head an educational organization or exert some influence on it. Leadership has been defined as the process “used by leaders to give purpose to the collective efforts of organization members while moving them to work collaboratively in an environment of mutual respect and trust” (Green, 2017, 26).

Regarding leadership models, during the last decades, there has been a simultaneous evolution and synthesis of the different models of leadership. *Instructional leadership* was developed in the 1980s, related to the effective school movement, and highly focused on teaching and the role of the principal (e.g., Philippe, 2003). The 1990s saw the triumph of *transformational leadership* (e.g., Leithwood, 2012), which focused on changing organizations and developing people. Finally, the turn of the millennium brought a new type of instructional leadership that was improved and updated: the so-called *leadership for learning* -more focused on learning than teaching- (e.g., Hallinger, 2009; MacBeath et al., 2018). Other new models were: *distributed leadership* (e.g., Gronn, 2000; Tian et al., 2016) and *leadership for social justice* (e.g., Bogotch & Shields, 2014; Jean-Marie et al., 2009), to point out only the most outstanding examples in the educational world. Today, we understand that to be effective, leadership should focus on learning and equity and, at the same time, try to develop the different groups of people in the school (families, teaching and non-teaching staff, students, and close community), improve the organization and distribute leadership through it (Grissom et al., 2021; Leithwood et al., 2020; Organization for Economic Co-Operation and Development, 2020).

From this theoretical foundation, the current study aims to compare the *educational management model* in Portugal and Spain, with a particular focus on the description and comparison of (i) the organisation of K-18 education, (ii) the characteristics of the teaching profession, and the teachers’ and principals’ recruitment and selection processes, and (iii) the government bodies set by the laws and the level of school autonomy and type of leadership and management.

The *educational management model* of a country is defined as the way of organising and exercising the management of the schools, something well related to the composition of the school governing bodies (Organization for Economic Co-Operation and Development, 2016a), the time dedicated to each one of the management/leadership functions of school leaders and highly determined by the recruitment process of teachers and leaders, and the type of organisation set by the laws (Barrios-Arós et al., 2015; Serrano Albendea, 2017).

The management model is defined by each country’s educational system and regulations. It can be more or less decentralised, and “a priori” we can find in the European context three types of educational management models: (i) centralised and bureaucratic: France, Italy, (ii) decentralised and guided by the market: England and Wales (Greany, 2022), Germany, and (iii) centralised and participatory as in the case of Spain and Portugal (Serrano Albendea, 2017).

## 2. Methods

This study adopts a comparative research approach (Cowen & Kazamias, 2009), assessing some educational indicators in two nations: Portugal and Spain. In this kind of study, it is relevant to address the question of the comparability of the data used. The response to this concern has been twofold: on the one hand, all the data has been obtained from national or international organisations of recognised prestige and reliability. On the other, the research team was made of academics from both countries to reduce the possibility of cultural bias that can appear in cross-national comparative research (Lim & Firkola, 2000).

Consistent with the above, the research builds on international reports such as Eurydice network reports, the OECD Programme for International Student Assessment (PISA), TALIS studies, or other OECD studies such as “Education at a Glance”, corresponding to 2015–2021 and primarily focused around the year 2018. Based on those international data, the study of the educational laws and the literature analysis, we compared some aspects of educational policies in Portugal and Spain, referring them to other countries in the European area and the OECD.

Regarding the educational situation, we focused primarily on PISA 2018 data because it was the latest data available at the time the investigation was carried out (2020–2022) and because we wanted to avoid biasing the information due to external factors such as the pandemic that began in 2020. Richard and Wiecek (2022), Waldow and Steiner-Khamsi (2020), and the OECD itself (Schleicher, 2019) stressed the importance of using PISA results for evaluating school systems, contributing toward the governance of education, and recommending reforms. Herbst and Wojciuk (2017, 122) highlighted that comparisons to assess student performance “can be made only on the basis of international assessment programmes”. Furthermore, they recommend taking educational systems that were similar at one time and then evolved differently and trying to represent and understand the differences. As this is the case in Portugal and Spain, the current study attempts to follow the recommendation cited above.

In addition, we have obtained information on each country’s educational systems by relying on the international reports already cited, especially on OECD indicators, as this is the authoritative source for information on the state of education worldwide (Organization for Economic Co-Operation and Development, 2020). We also relayed on the educational laws (e.g., “Lei de Bases do Sistema Educativo,” 1986; LOMLOE, 2020) and the reports issued by national organizations in Portugal (e.g., CNE, 2016; Liebowitz et al., 2018) and Spain (e.g., Consejo Escolar del Estado, 2020; SGEE-Subdirección General de Estadística y Estudios, 2021; Valdés et al., 2021). Whenever possible, we have supplemented data around 2018 with earlier or later information to adopt a more longitudinal picture that allows us to understand the situation better.

After compiling the information, we synthesized it into tables with quantitative and qualitative data, from which reflections and comments were made. Finally, we described the main findings and explored the implications of our findings for practitioners, researchers, and policymakers.

### 3. Contextual framework

Before starting our research, we need to know some information about the educational context of Portugal and Spain, including some macroeconomic variables. With this information, we intend to describe some essential elements to understand the situation in both countries before delving into comparing their management models.

We have chosen to analyze only three types of data: the expenditure on education, student outcomes and their evolution, and the permanence of students in the educational system. We are aware that we could have added information in many other aspects, but it seemed that with these three types of data, the reader could get a general idea of the state of education in the two countries.

Regarding economic data, the State School Council report in Spain (SGEE-Subdirección General de Estadística y Estudios, 2021, 63) pointed out that “the macroeconomic variables condition the magnitude of the resources, affect the efficiency of the processes, and influence the results. They are affected by the quality of the education system results to the extent that, if these improve, long-term economic growth is accelerated, and the prosperity of a society is increased”.

The analysis of the macroeconomic data presented in Table 1 begins with the GDP per capita, a variable in which Spain is ahead of Portugal and close to the average of the OECD countries; Portugal has a level of wealth well below the OECD average.

**Table 1. Summary of some key economic and educational indicators comparing Portugal and Spain**

Key indicators	Portugal	Spain	OECD
<b>Economic data and expenditure</b>			
GDP per capita current prices and PPPs (2018)	24.890 USD (34.246 in 2020)	40.711 USD (37.840 in 2020)	45.266 USD (45.181 in 2020)
Public expenditure on primary, secondary and post-secondary (non-tertiary) education (2018)	10.013 USD per student	9.336 USD per student	10,454 USD per student
Average annual growth rate in expenditure per student between 2012 and 2018	0.6 %	0.4 %	1.6 %
Proportion of GDP devoted to educational institutions (2018)	4.96 % (3.82% in primary and secondary education)	4.28 % (3.02% in primary and secondary education)	4.88 %, (3.46% in primary and secondary education)
<b>Educational data</b>			
<b>Achievement in basic skills (PISA 2018)</b>			
Change in reading performance between PISA 2006 and PISA 2018	19	No data	No data
Change in mathematics performance between PISA 2006 and PISA 2018	26	1	−1
Change in sciences performance between PISA 2006 and PISA 2018	17	−5	−6
Mean score in reading performance (2018)	492	No data	487
Mean score in mathematics performance (2018)	492	481	478
Mean score in science performance (2018)	492	483	486
<b>Permanence in the educational system</b>			
Early leavers from education	11.8 % (2018) 8.9% (2020)	17.9 % (2018) 16% (2020)	10.5% (2018, UE) 10.2% (2020, UE)
Educational attainment of the population aged 25–34: At least upper secondary education (2018)	71.5 %	67.7 %	84.6 %

Source: By the authors, based on Organization for Economic Co-Operation and Development (2018a, 2021), PISA 2018 results (Organization for Economic Co-Operation and Development, 2019)

Nevertheless, the share of national wealth devoted to general non-tertiary education is higher in Portugal than in OECD countries and Spain. Both countries have increased their annual expenditure per student since 2012, although Portugal has increased it more than Spain, but less than the average of OECD countries.

Regarding educational results, we observed a significant improvement in the Portuguese outcomes, both in the different areas evaluated and in the evolution over time and compared to the average results of the OECD. Spanish scores have had negative or poor growth, and Spanish students achieved below the OECD mean.

The last two indicators are related to the future these students can aspire to and the level of inclusiveness of the system. These data affect society's future since the lower the level of education, the greater the unemployment and the problems that stem from it. There have been different changes in the early school leaving rate (the percentage of the population aged 18 to 24 that has not reached upper secondary). Portugal's dropout rate was 30.9 % in 2009, finishing with 11.8% in 2018 and 8.9% in 2020. These data are similar and even better than the European average in 2018 and 2020 (10.5 % and 10.2%). Spain went from 30.9 % to 17.9% and 16% in the same years, still far from the E.U. average and was the third European country with the highest early dropout rate.

Another significant indicator is the percentage of the population aged 25–34 who attained at least upper secondary education in 2018: 71.5 % in Portugal and 67.7 % in Spain. The results from Portugal are better, although both countries are far below the average of countries from the OECD, implying future poverty and social exclusion risks.

In sum, the Portuguese school system “has witnessed historic improvements in access, attainment and performance over the past 20 years” (Liebowitz et al., 2018, 13), which is one of the reasons to speak of the “Portuguese educational miracle”. However, the Spanish education system results are still at a crossroads, and there is much room for improvement.

We will compare some aspects of both countries' educational systems to enlighten this situation, trying to achieve the objectives described in the introduction.

#### **4. Comparison of Portuguese and Spanish educational systems**

Spain and Portugal are culturally and geographically close and have similar educational systems. In line with our objectives, we are considering the same variables of analysis of both systems to detect similar and different points, which we describe in this section and summarise in Table 2.

##### **4.1. General organisation of Portuguese and Spanish educational system**

In Portugal, with a highly centralised school system (Crato, 2020), the same educational law has been maintained since 1986, and there is a long-term educational vision and a clear desire for improvement reflected in the regulations and the academic results (Crato, 2020; Organization for Economic Co-Operation and Development, 2018b). Spain is characterised by a succession of laws and less willingness to change than its neighbouring country (López-Rupérez & García-García, 2020). In Spain, educational competencies are transferred from the central government to the Autonomous Communities. The Autonomous Communities manage the educational system, but the state reserves the general regulation and the conditions for obtaining, approving, and homologating academic and professional qualifications.

Both countries have a very similar network of schools, with around 66% public schools and the rest private, although in Spain, many of these private schools are subsidised by the state.

Spain and Portugal share the same organisational model of primary and lower secondary education: after completing primary education, all students progress to lower secondary education and follow the same general core curriculum (Eurydice (European Education and Culture Executive Agency), Nathalie Baidak, Agathina Sicurella, Jari Matti Riiheläinen, 2020). One difference worth noting is that in Spain, compulsory schooling lasts ten years (6–16), and in Portugal, it takes twelve years (6–18). Only 12 education systems in Europe's 39 have more than 11 years of compulsory education (European Commission, European Education and Culture Executive Agency, Nathalie Baidak and Agathina Sicurella, 2021a), and Portugal is one of them. Another original element in Portugal is the clustering of schools based on *agrupamentos* that unite educational centres of different types headed by a single principal.

The option of grouping schools is not used in Spain, although the grouped rural schools would come close to that proposal. Despite the reality of the *agrupamentos* in Portugal, it would be worth



**Table 2. Comparison between Portugal and Spain: General Organisation of the educational system, teachers, principals, school government, autonomy, and participation**

	Portugal	Spain
<b>General Organisation</b>		
Educational Laws (from 1985)	Lei de Bases do Sistema Educativo (1986)	LODE (1985), LOGSE (1990), LOCE (2002), LOE (2006), LOMCE (2013), LOMLOE (2020)
Typology of schools	Public (65.8% in 2019/20) Private	Public (67% in 2019/20) Private publicly founded Private
Compulsory education (starting age-leaving age, the total number of years)	6–18 years 12 years	6–16 years 10 years
Special types of school organisations	Agrupamentos (clusters) (aprox 88% of schools)	Singular centres: CRIE, IVTC, National Reference Centers, Integrated Centers (a minority)
<b>Teachers</b>		
Requirements to be a teacher	K3-18: Master's degree	K3-12: Teacher's Degree 12–18: Bachelor's degree, a degree in Engineering or Architecture + Master's Degree in Teacher Training for Secondary Education, Bachillerato, Vocational Training, and Language Teaching
Starting salaries for full-time teachers in public schools (average of pre-primary, primary and secondary salaries) (2019–2020)	22.351 € (the same in all levels)	32.335 € (average, higher salaries in Secondary education) Pre-primary and Primary = 30.550 Secondary = 34.121
Potential of teachers' salaries to increase	115.9%	42%
Percentage of teachers who are, all in all, satisfied with their job (2018)	92%	96%
Percentage of teachers who are satisfied with their salaries (2018)	9%	50%
Teachers' mean stress index score (*) (2018)	11	8'1
Career progression	Single-level structure.	Single-level structure,
Conditions for salary progression	<ul style="list-style-type: none"> <li>• years of service</li> <li>• fulfilling CPD requirements</li> <li>• teacher appraisal results</li> </ul>	<ul style="list-style-type: none"> <li>• years of service</li> <li>• fulfilling CPD requirements</li> </ul> (appraisal is not a requirement for career progression)
Principals' participation in the choosing of public teachers	Minimal	Minimal
Challenges related to teachers	Shortages Oversupply Ageing teacher population	Shortages Oversupply Ageing teacher population
<b>Principals</b>		
Who can be a principal	Any teacher with the requirements	Any teacher with the requirements
Minimum years of professional experience for the appointment	5	5
Other requirements	Training in educational administration offered by a higher institution	Management project + Merit-based competition + (once selected) training accredited by the Ministry of Education or the Autonomous Communities

(Continued)



**Table 2. (Continued)**

	<b>Portugal</b>	<b>Spain</b>
Training needed to be a principal	A minimum of 250 h. training	A minimum of 120 h. training course
Who participates in the appointment of principals	General Council	School Council. A commission: <ul style="list-style-type: none"> <li>• Teachers (chosen by the Faculty)</li> <li>• Members of the School Council who are not teachers</li> <li>• A senior principal</li> </ul>
Remuneration system	Statutory salary as a teacher plus a management allowance Principals are paid on different pay ranges depending on the type/size of the school	Statutory salary as a teacher plus a management allowance Principals are paid on different pay ranges depending on the type/size of the school
<b>School Government, Autonomy and Participation</b>		
Organisation and Structure School Government	General Council School Principal Pedagogic and Administrative Councils	Collegiate bodies of participation in the government: School Council and Faculty Unipersonal management bodies: Principal, Head of Studies, Secretary Coordinating bodies
Who participates in the General Council (Portugal) and the School Council (Spain)	Student representative (only upper secondary) Teaching staff Parents/Guardians Administrative staff Local, regional authority <i>Local community representative</i>	Student representative (primary and secondary) Teaching staff Parents/Guardians Administrative staff <i>Principal</i> <i>Other members of the management team</i> Local authority
Percentage of decisions made at different levels of government in public lower secondary education (2017)	School: 15% Central or State: 77% Multiple levels: 8%	School: 10% Regional level: 22% Central or State: 55% Multiple levels: 13%
Curricular autonomy	The Ministry of Education is responsible for determining the curricula and the educational objectives. Schools are allowed flexibility in the curriculum up to 25% of the prescribed time (or more if there are curricular innovation plans)	The Ministry of Education is responsible for determining 50–60% of the curriculum, and the Autonomous Communities the rest. Schools can design part of the curriculum to the extent permitted by the autonomous community
Type of management model	Centralised and participatory	Centralised and participatory

(\*) The stress index score has a minimum value of four and a maximum of 16.

Sources: Authors and data from: Organization for Economic Co-Operation and Development (2018c), European Commission/Education, Audiovisual and Culture Executive Agency, and Eurydice (2021b)

further investigating their goodness. We understand that the situation requires rebuilding new ways of organising and managing schools, trying to safeguard the idiosyncrasy of the educational environments of the cluster schools, giving a new meaning to the teams of teachers, and overcoming the traditional grouping by cycle teams and departments or seminars.

#### **4.2. Teachers in Portugal and Spain**

The two educational systems have similar recruitment and selection systems in their public schools, based on selective tests that allow access to national bodies and transfer by points,

depending on the years of professional practice, to the different educational centres. This reality collides with the possibility that public centres can have their pedagogical projects and the chance that principals can intervene in the configuration of their teaching staff. This situation generates secondary problems such as the high turnover and instability of the teaching staff and its effects on the students' results (Tintoré et al., 2020a, 2020b). As an exception, we can cite that public principals of the Autonomous Communities of Madrid and Catalonia in Spain can propose a part of their temporary teaching staff for specific jobs (see Decree 102/2010 on the autonomy of educational centres in Catalonia and Order 3814/2014 of the Ministry of Education of the Community of Madrid).

The qualification required to work as a teacher is more demanding in Portugal than in Spain. In Portugal, all candidates for the teaching profession should have a Master's degree, which is not the case in Spain until Secondary education. Nevertheless, the starting salaries of Portuguese educators are lower than Spanish salaries considering teachers and leaders, although, in Portugal, the potential for teachers' salaries to increase over their career is the largest in Europe (116%).

In almost all the studied variables regarding teachers' well-being, Portuguese teachers report a high level of stress (11.0) compared to other U.E. countries (mean = 8.6) and Spanish teachers (8.1). In Portugal, teachers feel that they have too much lessons preparation, too many lessons to teach, too much marking, too much administrative work, too much responsibility toward students' achievements, maintaining classroom discipline, keeping up with changing requirements from authorities, addressing parent or guardian concerns or modifying lessons for students with special needs. Spanish teachers are concerned about having too much marking, administrative work, maintaining classroom discipline and keeping up with authorities' changing requirements, but they do not report feeling very stressed (European Commission/Education, Audiovisual and Culture Executive Agency and Eurydice, 2021b).

Regarding career development, both education systems have a single-level career structure. There are no formal job levels, and career progression consists in advancing on the salary scale. Salary progression is granted upon years of service and continuous professional development (CPD) in Spain and Portugal, and teacher evaluation is also considered in Portugal. The two systems allow teachers to "move towards managerial roles and to cover other functions during their professional life, although access to such positions is not framed within a formal career advancement structure. Portugal stands out (with Luxembourg) as the education system with the most variety of tasks performed by the teachers" (European Commission/Education, Audiovisual and Culture Executive Agency and Eurydice, 2021b, 56).

Some challenges in teachers' demand and supply (shortages and oversupply, ageing of teachers, and dropout) affect most European countries. The lack of teachers affects 35 education systems and can be particularly acute in specific subjects, such as science, technology, engineering, mathematics, and foreign languages. It can also affect specific geographical areas due to their remoteness, the socioeconomic disadvantage of some rural areas, the high costs of living in some urban areas, or their conflictive social environment (European Commission/Education, Audiovisual and Culture Executive Agency and Eurydice, 2021b). A shortage of teachers exists in Spain and Portugal and coexists with the ageing teacher population and oversupply, but a limited number of teachers leave the profession.

#### **4.3. Principals in Portugal and Spain**

The principals' selection system is similar in Spain and Portugal, and Serrano Albendea (2017, 32) defined it as 'the election for a specific period of a *primus inter pares* by the centre's staff, with very relevant participation—in Spain—of the School Council, and—in Portugal—of the General Council.

Both countries coincide in who can aspire to be a principal, the years of experience needed, and the remuneration system. In Portugal, management training is a prerequisite; in Spain, training is

necessary once the candidate has been accepted. They differ in the minimum number of hours of training (250 in Portugal and 120 in Spain), who offers the training, and who participates in the appointment of principals. Spain also requires a merit-based competition to be a principal.

Both systems coincide in their latest regulations in empowering school principals. Perhaps in the Portuguese context, the individual leadership is more valued, while in the Spanish case, the management team is promoted as a collaborative team to distribute internal functions and collegiate operation. Additionally, there are efforts to professionalise school management in Spain and Portugal.

#### 4.4. Educational management, leadership and autonomy in Portugal and Spain

The organisational and operational structures established for educational centres are similar in both countries, with unipersonal and collegiate bodies.

In Portugal, the Decree-Law 75/2008 establishes the school administration and management bodies shown in Figure 1, which also shows how these bodies hierarchically relate to each other. The Decree-Law reorganised the configuration of public schools' administrative bodies by introducing two significant changes:

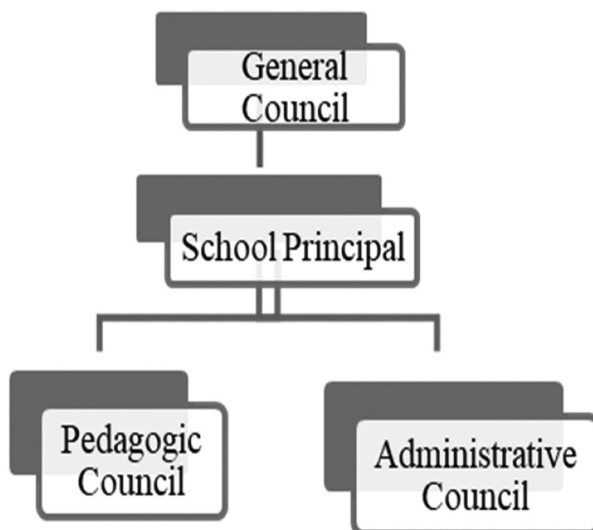
The institution of a strategic management body—the General Council—with representatives from teaching and non-teaching staff, parents, upper secondary education students, municipalities, and the local community. And the substitution of a collegial management body—the Executive Board—for a *Director* (the principal). The principal is a unipersonal body that a deputy-principal and a few adjuncts can assist.

In Spain, the LOMLOE establishes the management bodies shown in Figure 2:

The principal holds the school's legal representation, although the LOMLOE (2020) has restored to the School Council some functions that increase the weight of this body in the centres' decisions. Usually, the principal works with the help of the head of studies and the secretary (management team) to deal with administrative and economic issues, the organisation and operation of the centre, manage the school's educational project and promote the participation of the academic community. But, in the end, principals are responsible for everything that happens in the centre.

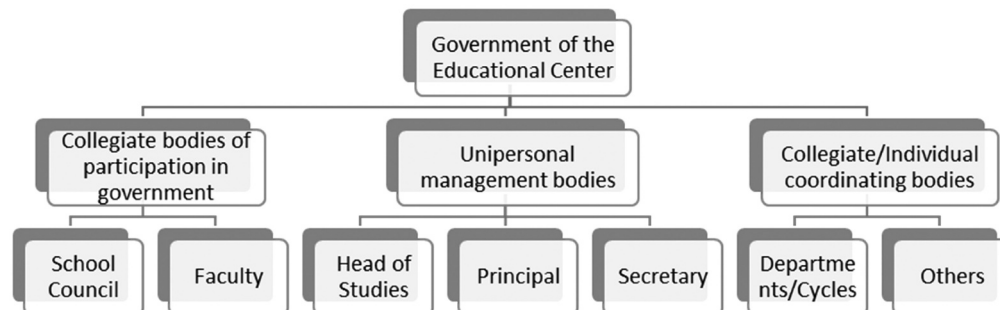
**Figure 1. School administration and management bodies in Portuguese public schools.**

Source: Authors



**Figure 2. School administration and management bodies in Spanish public schools.**

Source: Authors



The General Council of Portugal and the School Council of Spain are required by legislation and have a similar composition and similar functions (the strategic planning of the centre and the election of the principal). In both cases, these bodies favour participation in the government of schools. The Pedagogic Council (Portugal) and the Pedagogic Commission (Spain) also have similar functions related to the schools' pedagogical coordination, supervision, and educational guidance.

Both educational systems maintain a high level of centralisation if we consider that the Ministry of Education defines the general operating rules exclusively and meticulously, as indicated by García Redondo (2016), Lima (2020), and Cabral and Alves (2020) for the Portuguese case, and Gairín (2020) and Gargallo and Ángel (2019) in Spain. There are educational transfers to the Autonomous Communities in Spain, and the principals can define their management project. In Portugal, there is some curricular autonomy, the management of non-teaching personnel is carried out at the regional level, and the school cluster can define its pedagogical projects. However, we analyse the educational system's direction and observe a limited and instrumental decentralisation, which does not allow the territories to deploy their policies responding to their idiosyncrasies. One evidence of what we say is that, despite the time that has elapsed since the beginning of decentralisation, it is difficult to find highly differentiated educational proposals in the diverse territories of both countries.

Considering the relationship between autonomy in the definition and elaboration of the curriculum and evaluations and the school system's performance (Organization for Economic Co-Operation and Development, 2011), the lack of independence is especially worrisome, being an issue that comes from afar (Bolívar, 2010), and it is regulated. It seems there is political will for it to occur, but it has not yet been settled in either country.

Schools can differ in the degree of autonomy given to them, in the domains over which principals have freedom, and in their level of effective leadership (Organization for Economic Co-Operation and Development, 2016b), so next follows the analysis of educational autonomy in Portuguese and Spanish schools from the three perspectives.

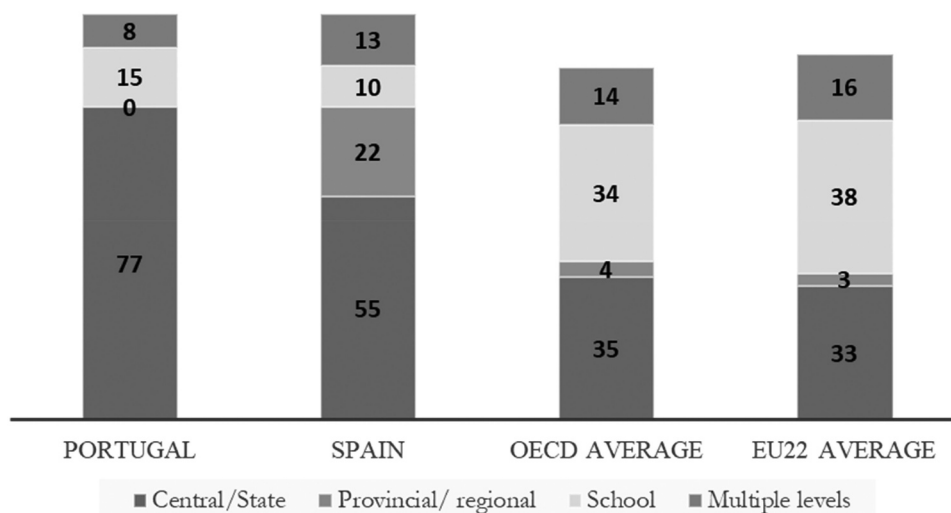
a) One critical perspective to analyse autonomy is *the level where the decisions are taken*. The data in Figure 3, with OECD indicators of 2017, refers to compulsory secondary education but can be extrapolated to other levels.

Spain and Portugal have lower school autonomy than the OECD average. Spain is in the group of countries with lower decision-making capacity at the school level (10% of decisions and position 34 out of 38 OECD countries. Organization for Economic Co-Operation and Development, 2018a). Portugal ranks 31st out of the 38 OECD countries, and only 15% of decisions are taken at the school level (CNE, 2016; Organization for Economic Co-Operation and Development, 2016a, 2018a).

b) Related to school autonomy is the concept "*autonomous school*", meaning those educational establishments where the principal or the government bodies take significant liability for many

**Figure 3. Percentage of decisions taken at each level of government in public lower secondary education, by domain (2017).**

Source: Authors, based on Education at a Glance 2018: OECD Indicators—(Organization for Economic Co-Operation and Development, 2018a). Table D6.1



tasks, especially those that involve greater responsibility (Organization for Economic Co-Operation and Development, 2020). Schools are autonomous when principals are responsible for school governance. In the case of Portugal and Spain, of the 11 variables measured by TALIS 2018, only one in Spain and three in Portugal obtained better results than the average of the OECD countries.

Portuguese and Spanish schools can decide on budget allocation within the school, establish student disciplinary and assessment policies, or choose the learning materials. Additionally, Portuguese schools can approve students for admission or hire teachers. But both countries have little autonomy in “hard” topics, such as dismissing teachers, setting teachers’ starting salaries or salary increases, determining course content, or deciding which courses are offered.

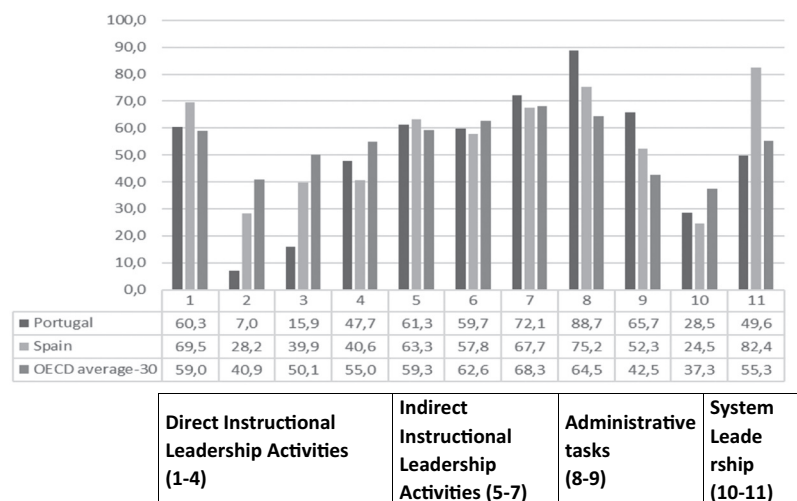
We cannot say that schools neither in Portugal nor in Spain are “autonomous” if we compare them with the OECD average and many European countries.

- (a) Finally, *autonomy increases its impact when there are solid and effective leadership structures* in a school (Organization for Economic Co-Operation and Development, 2016a), so it is worth describing the type of leadership activities developed by Portuguese and Spanish school leaders (see, Figure 4). Organization for Economic Co-Operation and Development (2020) defines three types of leadership tasks: instructional (direct and indirect), administrative and systemic. Direct instructional activities are those actions made by the principals to improve the quality of instruction enacted by teachers and are related to what we have called *instructional leadership*. Indirect instructional leadership is more related to *leadership for learning* (Gurr, 2015). Here, it is worth noting again the difference between instructional leadership and leadership for learning. The two concepts are often used interchangeably to refer to the most desirable leadership in educational organizations, the one that focuses on the core objective, student learning. However, there is a difference between both types of leadership. While the first (instructional leadership) is focused on the principal and teaching (Philippe, 2003), leadership for learning is more systemic and focuses on students’ learning (Hallinger, 2009; MacBeath et al., 2018). We believe that when the OECD refers to effective leadership, it suggests this last type of leadership for learning that is at the same time instructional, transformative, equitable and systemic.

Figure 4 shows how frequently principals in Portugal, Spain and the OECD engage in specific actions that can be allocated to different types of leadership (Organization for Economic Co-

**Figure 4. Percentage of lower secondary principals who have “often” or “very often” engaged in leadership or administrative activities in their school in the 12 months before the survey.**

Note: 1. Collaborating with teachers to solve classroom discipline problems.  
 2. Observing instruction in the classroom. 3. Providing feedback to teachers based on principals’ observations.  
 4. Working on a professional development plan for the school. 5. Taking actions to



Operation and Development, 2020). They stand out on bureaucratic and administrative tasks related to school management, followed by indirect instructional leadership activities, which aim to improve the climate and culture of schools and are more related to leadership for learning. The data in Spain show that principals dedicate to informing families and manage discipline, whether Portuguese principals spend more time promoting collaboration among teachers and their responsibility toward student outcomes. In short, leadership in these countries is still bureaucratic, although there are elements of leadership for learning.

Finally, the elements described in this section allow us to place Portugal and Spain in a management model that Serrano Albendea (2017) defines as participatory and centralised. Participatory because the school community participates in the government of the centre through the councils, and centralist because the central government takes nearly all major decisions, and autonomy is still scarce. This management model is different from other OECD countries with a more democratic tradition, participatory school administration models, and election of permanent principals.

## 5. Discussion

This article began by analysing some macroeconomic and social data on education. Those quantitative data can affect the results and constitute threats or opportunities for the future of educational systems and societies.

At first glance, what is most striking about these quantitative data is that starting from shallow and similar levels, Portugal has achieved impressive results, while in Spain, growth has been scarce. Portugal improved significantly in educational outcomes, expenditure on education and the permanence of students in the educational system. Spain was more affluent than Portugal, but the high level of early school dropouts or the low public expenditure per student can cause future problems and affect students’ results. Although Spain is slightly improving the permanence rate of its students in the system, which is always good news, it is necessary to continue down this path because the school dropout rate in 2020 was still very high and almost twice as high as in Portugal.

Then, we analysed the structure of the educational system in Spain and Portugal, the characteristics of the teaching profession, the selection process of teachers and leaders in public schools, and the leadership, management, and autonomy in those countries.

Portugal and Spain share the existence of collegiate bodies with the involvement of the educational community, similar systems of selection, progression and affiliation of teaching staff, similar methods of accessing the principalship, a type of leadership still excessively focused on bureaucratic aspects, and equivalent -and scarce-, levels of autonomy.

Regarding the differences, perhaps the most significant is that Portugal has had enormous legislative stability since the Law of Bases of the Educational System (1986) was maintained—with some alterations—until now. However, in Spain, since 1985, there have been six organic laws for the organisation of the educational system. So, it would be desirable to have a consensus between Spanish political parties to favour an educational law that would not change every time the party in power changes, thus prioritising reforms focused on improving results instead of changing curricula or the functions of the different government bodies continually.

Another significant difference is that compulsory education in Portugal extends to 18 years old and in Spain only to 16. It seems that the system is working in Portugal both in terms of results and in reducing early school leaving (López-Rupérez & García-García, 2020). Spain could try to implement a similar design, which means increasing its spending on education, which is lower than Portuguese spending.

The school clusters are another differential element in Portugal, and evaluating their functions and the didactic and organisational implications would be interesting. Also, it would be worth studying if there is some relationship between this new form of organisation and the improvement in educational results.

Indeed, the challenges of creating school clusters compelled educational actors to rethink school leadership roles: the laws strengthened the power of principals, but the difficulties in governing such large schools led, in many cases, to processes of distribution of leadership within and between schools and reinforced collaboration (Tintoré et al., 2020b). Schools in the knowledge society are doomed to work and collaborate in a network; consequently, clusterization can help enhance internal collaboration and make external cooperation a reality. In any case, it will be necessary to overcome the mere administrative coordination to make the pedagogical cooperation effective.

We need the best professionals to improve education, and here again, some differences exist between Spain and Portugal. Spain can increase the requirements to be a teacher (currently, a broad social debate is taking place for improving the teaching profession). Portugal should enhance the well-being of their teachers, including the salaries. The high-stress level of these professionals is a threat to be considered for the future of education in Portugal.

According to the European Commission/Education, Audiovisual and Culture Executive Agency and Eurydice, 2021b),

“The levels of stress are lower when teachers work in school environments that they perceive as collaborative, when they feel self-confident about motivating students and managing their behaviour, and when they feel they have autonomy in their work. On the contrary, teachers report experiencing more stress when they work in classrooms they perceive as disruptive, work longer hours, and are subject to appraisal as a requirement for career progression” (142).

This excerpt provides ideas for combating teacher stress conditions.

Data referred to the economic retribution and the qualification to enter the profession are related to the importance given to the teaching profession and the existence, or not, of a teaching career that motivates and commits teachers. If we want the best education, it is



essential to attract and retain the best-qualified teachers and leaders (European Commission/ Education, Audiovisual and Culture Executive Agency and Eurydice, 2021b) with salaries according to the profession's significance and improving over time, career development planning, social recognition, and good working conditions.

It is also necessary to have the best principals, which implies re-evaluating their access and permanence. Consequently, it could be essential to require a master's degree in Spain before becoming a principal, as in the Portuguese case. Or, in Portugal, a management project and periodic assessment, as in the case of Spanish principals. It is urgent to adopt several measures for the recruitment, support, and guidance of principals; and training that empowers them for the complex demands of their action.

Regarding leadership and school autonomy, in Europe and the OECD, principals are evolving from being bureaucratic leaders to leaders for learning (Organization for Economic Co-Operation and Development, 2020) and from centralization to decentralization of their education systems (Organization for Economic Co-Operation and Development, 2016b). However, this evolution is poorly developed in Spain and Portugal, making the gap between promises of autonomy and realities evident.

In Portugal and Spain, 77% of decisions are taken at the state or autonomous level, Spanish principals only make 10% of educational choices, and Portuguese directors only 15%, so the most relevant educational decisions continue to be made by the central government level in both countries. Principal's decisions in Spain refer fundamentally to the organisation, teaching, and resources, being non-existent concerning planning and structures, and very low in terms of personnel management (Gargallo & Ángel, 2019). Gairín (2020) concluded that there are minimal bases of autonomy, and the country remains far from the rest of Europe. In Portugal, Flores and Lynne Derrington (2017) concluded that the freedom to hire or dismiss teachers or manage the general curriculum exists scarcely. And Savvides et al. (2021, 804) stated that Portuguese educators still "lack agency in terms of curriculum and pedagogy". The analysis of João Barroso (2004), who perspectives the school autonomy as a necessary fiction, is still valid and pertinent in the Portuguese case nowadays.

However, some scholars (Crato, 2020; López-Rupérez & García-García, 2020; Silva et al., 2016) highlight an increment in the level of curricular autonomy and school autonomy in Portugal based on Decree-Law no. 137/2012, Decree-Law no. 55/2018 and Ordinance no. 181/2019, that extended the possibility of greater curricular flexibility for schools. The academics relate these facts with the impressive improvement in educational results. But in Spain, Autonomous Communities and schools also have some curricular autonomy, and results have not improved.

Considering both countries, they present a high level of decisions at the regional or central level, but they are at the lowest when considering the principals and the educational centres. General laws and regulations indeed emphasise the importance of autonomy, but the truth is that it has not been developed in all their possibilities. In the end, education at the service of the specific context and the chances of training adapted to the participants are limited de "facto".

On the other hand, the lack of genuine autonomy means that the educational systems have contradictions on several points. The schools have their pedagogical projects and can elect their principal; however, the resources linked to the operation of the school are given and prescribed by the educational system or other nearby entities (municipalities, for example), and detailed rules of a general nature define the method of selection and election of the principal. On the other hand, the curricular and time structure set by the system prevents the development and sedimentation of more global and interdisciplinary proposals such as project development, problem-based learning and service-learning.

## 6. Conclusions

This paper aimed to compare some educational topics related to school management and leadership in Portugal and Spain. We have determined the strengths and weaknesses of each system and pointed out the common problems, especially the limited autonomy of principals, which can slow down development processes. We have also pointed out some improvements that could be conducted in each country.

We identified significant similarities between the Spanish and Portuguese educational systems in their government, structure and operation. Indeed, geographical and cultural proximity can partly explain the resemblances, namely, the centralized and participatory management model, the excessive bureaucratization of school administration, the need to improve leadership for learning and the limited autonomy of principals.

From the analysis of the situation, we suggested improvements to be conducted in each country or both. For example, Portugal could review its policies regarding teachers in terms of the salaries and working conditions and help reduce the stress level of these professionals. The situation in Spanish education requires urgent measures concerning student outcomes and school dropout. To achieve these objectives, Spain could allocate a more significant proportion of GDP to education or improve the requirements to be a teacher (for example, demanding a master's degree for primary teachers or better pedagogical preparation for secondary teachers). Spain can also assess whether the measures carried out in its neighbouring country (legislative stability, extension of compulsory education to 18 years of age, changes in the structure of schools) would help improve its results and perhaps use the example of Portugal as a reference. Both countries could lead policies to attract and retain the best-qualified teachers and leaders, improve access to the profession and improve the attractiveness of the teaching career to face future shortages related to the ageing of teachers and leaders. All these proposals require that principals enhance their degree of autonomy and be able to exercise leadership focused on learning, development, equity and participation.

Since the management of public schools in both countries is centralised and participatory (Serrano Albendea, 2017), there is a contradiction between the model of educational and social participation proposed and the reinforcement made of the direction as a unipersonal body. Decentralisation, collaborative processes, and distributed leadership models should be promoted to have cooperative schools and communities.

The contradiction mentioned above also affects the role and functions of the management team, which should be identified more as a promoter of the intended change and energiser of the school community. Instead of principals only focused on the needs of the system and strict compliance with the rules, we need principals who are equally attentive to the needs of the system and the people, promote the necessary educational changes, ensure compliance and intervene in the conflicts of interest that always occur.

The Strategic Education Governance (SEG) project (CERI (Center for Educational Research and Innovation), 2019) supports countries in developing flexible and adaptive governance processes to deal with the increasing complexity of their education systems. It aims to help countries develop more competent governance arrangements sensitive to context and improve by building upon robust knowledge systems, stakeholder cooperation and constructive accountability. In this sense, it would be interesting to follow the recommendations recently proposed by the SEG.

In the current context, we need principals who act as change agents (Gairín, 2004) and who become pedagogical leaders by focusing on teaching and learning issues (Ritacco, 2019), structuring schools as professional learning communities. Its importance is thus linked to aspects as diverse as the activation of inclusive and equitable education in line with the 2030 sustainable development goals (United Nations Educational, Scientific and Cultural Organization, 2018), social

justice issues (Bogotch & Shields, 2014), teacher support (Verónica & Vásquez, 2019), the empowerment of identity and sense of relevance (Jara et al., 2019), their importance as emotional leaders (Villa, 2019) and being promoters of the best teaching practices (Rodríguez-Gómez & Gairín, 2017).

Finally, it seems that the policies undertaken in Portugal to improve education are succeeding and could serve as an example for Spain. Portugal reacted better than Spain to the “PISA shock” (Bolívar, 2019; Santos & Centeno, 2021), and the educational reforms reflected “strategic thinking and a clear theory of action underpinning change” (Organization for Economic Co-Operation and Development, 2018c, 11). These policies have even obtained laudatory comments by the Organization for Economic Co-Operation and Development (2018b) and are based on adopting “small incremental changes, but all in the same direction” (Crato, 2020, 216). The reforms pretend to offer quality education for all, promote equal opportunities, focus on the central pillars of education: reading, mathematics, logic, or science, adapt vocational training to the country’s future needs, increase curricular flexibility, evaluate the educational system from outside, or to apply all we know about learning (Crato, 2020).

In Spain, some progress has been made in school autonomy, and many ground-breaking programs and projects have developed in recent years. Such programs include “Project School 21”, “Project Improve your Public School”, “Educational Transformation Acceleration Program”, “Whole Child Development Leadership Program” (established in Spain and Portugal), and many others. However, the continuous legislative changes, the excess of maximalism and lack of gradualism of the objectives (López-Rupérez & García-García, 2020), and the low intensity of the reforms are not contributing to improving the results as needed. As Santos and Centeno (2021) stated recently, countries improving significantly in their PISA rankings over the years are increasingly used as reference societies in education policy. As Spain is so close to Portugal and shares many features, it is easier for Spain to follow the example of the neighbouring country to undertake the necessary educational reforms.

It is essential to know the strengths and weaknesses of educational systems if we want to combat the structural inadequacies and bet on improvement. However, we are fully aware that the differences or similarities between both educational systems do not fully explain (much less cause) the different outcomes in Spanish and Portuguese education but can contribute to its explanation and will require further research.

Throughout this article, we have tried to highlight the similarities and differences between some elements of educational systems in Spain and Portugal. Undoubtedly, other variables could have been considered, and some of them have been studied by other authors (Ávalos-Bevan & Assunção Flores, 2021; Heisig et al., 2020; López-Rupérez & García-García, 2020). But this paper’s limitations can be the basis for future research. From this comparative study, we would like to continue investigating the relationship of the data presented in this article with educational attainment and the improvement of education in Portugal and Spain.

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