A Literature Review of Welfare State Restructuring in Education and Health Care in European Contexts:
Implications for the Teaching and Nursing Professions and their Professional Knowledge

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Abstract

This literature review is produced as part of an EU Sixth Framework Programme research project entitled Professional Knowledge in Education and Health: Restructuring work and life between the state and the citizens in Europe (ProfKnow). It aims to present research from seven European countries on restructuring in education and health care and the implications for the professional knowledge of teachers and nurses.

This review presents literature from Northern European welfare states (Sweden and Finland) and compares it with Southern European welfare states (Greece, Portugal and Spain) and offshore countries (England and Ireland). The Northern European social democratic outlook is contrasted with the Southern European subsistence model with its increased reliance on social capital. Meanwhile, Ireland appears to be an anomaly, situated in the North but having retained its religious heritage and high levels of social capital while England can be seen as the advance guard of the Neo-Liberal zeitgeist in Europe.

Examination of the different national trajectories in health and education partly explains the crisis in Europe over the failure to ratify the EU Constitution (EU Summit 16-17 June in Brussels). The argument can be read as a conflict over restructuring between those who favour the ‘Anglo-Saxon’ model with liberalisation of markets, long working hours and flexible employment against those who favour the continental model with its more regulated labour markets. Meanwhile the inconclusive result in the recent German general election (18th September 2005) can be seen as uncertainty of the electorate over restructuring policies.

An international research review of welfare restructuring in education and health care and the professions and professional knowledge finds there is disagreement in the literature over the extent of convergence of welfare provision internationally and within Europe with some commentators seeing the Neo-Liberal agenda as having a worldwide impact on professions and others envisaging it more as a rhetorical discourse.

Periodised national reviews of literature on the restructuring of education and health care of ProfKnow countries demonstrate the dramatically different development of the teaching and nursing professions over time and highlight how professional knowledge is deeply dependent on national and local contexts.

This literature review is the first work package (WP1) of the project and will be followed by national case studies (WP2), surveys of teachers and nurses (WP3) and life history interviews and ethnographic work (WP4 and 5). The life history interviews will be inter-generational with the aim of uncovering information about how teaching and nursing professional personas have changed over time and so elicit information about how restructuring is influencing professionals and their knowledge.
The aim of Work Package 1 (WP1) is to achieve an integrated view of the current state of research on welfare state restructuring in education and health care with a focus on professional actors, their positions and experiences and implications of restructuring in terms of professional knowledge.

Objectives are to achieve and compare descriptions and analyses of current research knowledge within different national cases on the effects of restructuring in education and health care with a focus on (a) professional positions and experiences and (b) implications for practical and professional knowledge. Deliverables are 7 national reviews and one international literature review.

This review aims to compare the research perspectives, approaches and findings on restructuring in education and health and professional knowledge of Northern European welfare state models (Sweden and Finland) with Southern European welfare state models (Greece, Portugal and Spain) and offshore countries (England and Ireland).

In all the ProfKnow member states there is more literature on the teaching profession than on the nursing profession. In Portugal and Ireland, research into the nursing profession is a new phenomena and literature is especially sparse. Ireland is also lacking in research in the education sector and much of the literature is based on government sources. In comparison, in England, restructuring in health and education has been extensive as has been the literature it has generated. Meanwhile in the Nordic countries, restructuring has been less dramatic but is still a feature in the literature.

The international literature review finds there is disagreement about the extent of convergence of education and healthcare systems across Europe with some seeing Neo-Liberalism prevailing globally and others seeing it as more of a rhetorical discourse.

Periodised summaries of literature on the histories of the restructuring of education and health care systems of ProfKnow consortium members are examined in detail. For Finland page 25, Sweden page 48, Greece page 74, Portugal page 99, Spain page 153, Ireland page 195 and England page 227.

The national literature reviews reveal huge differences in the trajectories and social construction of the teaching and nursing professions across the ProfKnow countries. However common issues can be noted in the literature, including decentralisation, privatisation, marketisation, labour supply, secularism, new public management and the use of information technology (IT). Feminisation of the teaching profession and gender relations in the nursing profession are common themes across the ProfKnow members’ literature. In health care, issues such as inter-
collaborative working and the increase in primary care are also present in literature across ProfKnow countries.

• The concluding chapter compares the international and national literature reviews in terms of periodisations, generations, contexts and professions. From this, it can be evidenced in the period following 1980 but with increasing force since 1995 there is a convergence in Neo-liberal patterns across the ProfKnow countries at the level of government discourse. The degree to which Neo-liberal ideology has moved from rhetoric to practice varies with each country following its own idiosyncratic course, refracting or mediating the discourse according to its own national context. There is a lack of literature comparing generations of teachers and nurses and the ProfKnow project aims to explore this issue.

• There is a significant amount of literature especially in education to suggest that reforms are having an adverse effect on the morale of teachers and nurses in the countries studied. This problematic conclusion suggests consideration of how world movements of restructuring and performativity need to be negotiated and mediated according to the distinctive and widely supported social priorities of the European Model is long overdue.

• This literature review is the first deliverable of the ProfKnow project. It will be followed by inter-generational life history interviews, ethnographies and surveys aiming to uncover information about how teaching and nursing personas have changed over time and so uncover information about the effects of restructuring on the two professions.
Chapter 1

International Research Review on Restructuring in Education and Health: Implications on Professions and their Professional Knowledge

Caroline Norrie, Ivor Goodson

Reviewing literature on restructuring of education and health care and the implications for teachers and nurses is a substantial undertaking and involves huge reductionism. The methodology of this literature review was:-

- To carry out an international literature review including searching for information available from the websites of organisations such as the World Health Organisation (WHO) and Organisation for Economic Co-operation and Development (OECD) as well as using electronic databases and on-line journals.
- To ask each consortium member to review national literature on restructuring and the implications for teachers and nurses and their professional knowledge in a periodised way, with emphasis on the most recent years.
- National results and international results were then analysed and compared (see final summary – chapter 9).

This literature review includes works from multiple disciplines including education, nursing, medicine, history, anthropology and social sciences as they are all relevant to the study. Research is defined widely, including theoretical studies, post-graduate and doctoral dissertations, research project reports, articles in journals and newspapers, national and local government resources such as websites, policy documents, papers and statistics as well as documents produced by unions, charities, professional bodies and private organisations.

The following international research review of welfare state restructuring in education and health care and implications on professions and their professional knowledge is divided into three sections. The first section presents an international literature review of definitions and histories of the conceptualisation of the key areas – restructuring – and education, health, professions and professional knowledge. The second section presents literature on the implications of restructuring specifically on teachers and then nurses.

It should be noted that the search engines of Ingenta, ERIC and WoS that were used for this search are predominantly made up of literature published in English so present a globally and culturally biased outlook. Consequently this literature review is not in reality an international research review, but rather a review of literature published in the English language. Added to this, the role of trans-national statistics such as those produced by the WHO, OECD, Eurostat and

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1 See appendix 1 for databases and searches used
CERI, is also controversial due to the problematic nature of data collection, and the exaggerated influence these indicators can wield.

**Restructuring**

Restructuring is not an easy concept to define and can be used on many levels. “Restructuring has no single agreed definition. Its meaning is to be found in the context and purpose of its use.” (Hargreaves, 1994: 260). Restructuring can be seen as a top-down or a bottom-up process. Lindblad and Popkewitz (2004) detail the complex global/local, state and societal interactions involved in the social construction of restructuring and note that most literature on it is produced in Anglo-Saxon countries. They aim to identify “some of the conceptual difficulties of applying analytical tools of Anglo-Saxon studies to contexts outside that sphere.” (Lindblad and Popkewitz 2004:x). They understand restructuring as a social construction:-

“...a word that relates to a number of different cultural and social discourses that overlap to form rules and standards that order and classify the objects of practice and the possibilities of action. We think of these rules and standards of thought as a “system of reason” (Popkewitz 89) that governs, normalizes and naturalizes action.” (Lindblad and Popkewitz 2004: x)

Using the widest definition, restructuring can be seen at a global level and is particularly associated with Neo-Liberalist discourses emanating from organisations such as the World Bank and the IMF and processes such as decentralisation, de-regulation, consumerism, privatisation, marketisation, secularism, auditing and New Public Management. Hyper-globalist literature such as Ohmae (1990) and Fukuyama (1992) see a converging world where the nation state is already irrelevant supplanted by trans-national companies and Information Technology (IT). Globalisation sceptics, for example (Hirst and Thompson, 1999, Gray, 2001) see a divergent world with the international economy segmented into 3 regional blocks. Meanwhile, historical analysis (Braudel, 1979) shows that globalisation has existed since the 16th century. Transformationists such as Giddens (1990) see contemporary patterns of globalisation as historically unprecedented and claim that states, societies and workers across the world are experiencing a process of profound change as they try to adapt to the new technological environment. Castells (1998) is possibly most influential with his concept of flows and movements of people, capital, knowledge, services and styles, unstructured by regional, state or continental boundaries, but by a variety of networks and pathways that open up new possibilities of liberation and exploitation. Edwards and Usher (2002) use the term ‘globalisation processes’ as a recognition that globalisation is both material and discursive and to ‘avoid eliminating agency’ or ‘inducing fatalism’.

‘Trends’ such as increased secularisation in Europe (Bruce, 2002) and the decline in vocations, greater participation of women in the labour market, the decline of ‘jobs for life’, the massification of further education and the erosion of the ‘special’ nature of professions can be seen as part of global processes.

Using a less general definition restructuring can also be seen as national level policy changes in welfare states. Findings of this research review show there is
disagreement in the literature over the degree of restructuring occurring and the extent of convergence between different systems. There is a vast literature on the growth of welfare states, but there is much less literature available on welfare state restructuring e.g. (Clasen 2002, Ferrera et al., 2002, Freeman and Moran, 2002, Sykes et al., 2001, Daly and Rake, 2003, Deacon, 1997). Most of this literature is overshadowed by the work of Esping-Andersen. His analysis of the situation in Europe is that, "welfare state rollback, let alone significant change has been so far modest" and this can be evidenced by the stable levels of expenditure over the last 10 years. He argues that most states (apart from the United Kingdom and New Zealand) have had limited intervention and only made marginal adjustments (Esping-Andersen, 1996:11).

Pierson aims to examine welfare state retrenchment and emphasises constraints on reform from interest groups and voters. He agrees with Esping-Andersen’s frozen welfare state landscape, especially in continental Europe as long established policies have become institutionalised, cultivated by vested interests and strongly defended. He states the welfare state is more resilient than other areas of national political economies and far more durable than existing theories of the welfare state would lead one to expect. Pierson argues welfare state retrenchment requires elected officials to pursue unpopular policies. His argument highlights the characteristic qualities of retrenchment politics, the principal theories of welfare state expansion and suggests why the distinctiveness of retrenchment makes a straightforward application of these arguments to the contemporary welfare state problematic. He then explores the dynamics of retrenchment in the United Kingdom, USA, Germany and Sweden and finally offers some basic propositions about retrenchment politics (Pierson, 2001). Ferrera et al. agree “news of the demise of welfare states is much exaggerated” (Ferrera et al., 2002:3). Others such as John Gray (1998) disagree with this and see the welfare state as an institute in decline as a direct effect of globalisation. Welfare has to be dismantled (social dumping) so states can compete in the race to the bottom. Deacon (1997) writes that globalisation sets welfare states in competition with each other, raises social policy issues to a supranational level and generates a global discourse on the best way to regulate capitalism in the interests of social welfare.

Whatever is happening on the ground, global competitive pressures are used by governments as justifications to curtail spending and carry out restructuring, despite the fact strong globalisation theories may have been shown to be over-deterministic (Held et al., 1999, Scharpf, 1997, Weiss, 1998, Bourdieu, 1988). Savage and Atkinson’s (2001) interpretation of globalisation is that it is part of a strategy designed to reduce the electorate’s expectations of what governments can actually do in the modern world. They also ask if Europeanisation is state-sponsored harmonisation or market driven convergence?

In fact there is literature arguing welfare states may actually be most essential when there is a high degree of globalisation, for example in Austria, the Netherlands and Sweden. There is a connection between the degree of international openness and the level of government expenditure. Societies that expose themselves to greater amounts of external risk demand a larger governmental role as a shelter from vicissitudes of the global market (Rodrik,
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The success of the Dutch corporatist economy in preserving their welfare state, while incorporating more women in the workforce and increasing GDP is examined by Visser and Hemerick (1998). It has also been argued that the growth of financial markets and removal of exchange controls does not restrict a state’s macro-policies as is commonly claimed. In fact, the removal of exchange controls and adoption of monetarist policies in a number of European countries in the 1970’s and 1980’s were designed to defeat domestic inflation (Notermans, 1997).

There is significant literature arguing against global Neo-Liberal restructuring and its effect on workers. The negative effects of economic growth on workers and the effects of the persistent attachment of governments to measuring the GDB as an indicator of the well-being of an economy and society are criticised (Inglehart, 2000, Hamilton, 2003).

The degree of social capital is increasingly being seen as a better indicator of the health of a society by policy makers. Drawing on Bourdieu (1986), Putnam (2000) found that areas with low social capital, measured by the associational life and level of trust were ruled by the most unsuccessful governments and demonstrated greater inefficiency and corruption. He writes about the decline of Americans’ participation in politics, civic groups, religious organisations, trade unions and professional organisations, as well as in informal socialising, leading to a society where Bowling Alone is the norm.

Reich (1992) calls what we are witnessing today the end of ‘economic nationalism’ – the notion that members of a nation succeed or fail together and share a responsibility for the economic well being of their country. Instead he sees populations dividing into new classes of ‘symbolic analysts’ versus ‘in-person service workers’ or ‘routine production services’. Bobos in Paradise (Brooks, 2000) also notes the rise of the IT workers as a class in society and how university education is increasingly irrelevant for these workers who learn on the job in the private sector. Menzies says we live in a media orchestrated unreality. Society is unravelling at the seams due to the strain caused by free trade agreements, corporate and governmental down-sizings, and most fundamentally, restructures induced by new information technologies (Menzies, 1989, Menzies, 1996).

In Risk Society, Beck (1999) identifies New individualism in societies as replacing class. Welfare states methods of ‘institutionalised individualism’ - giving benefits to individuals rather than families are seen as encouraging a me-first attitude without responsibilities. New individualism is associated with the retreat of tradition and custom from our lives, a phenomenon involved with the impact of globalisation (Giddens, 1988, AnttiKainen et al., 1996).

Stiglitz (2002) illuminates global restructuring, criticising the IMF and the World Bank for forcing countries to liberalise their markets to global capital and compelling countries to restructure their public services at the expense of local workers. The two big ‘service industries’ not yet widely privatised throughout the globe are health and education. The World Trade Organisation’s General Agreement on Trade in Services (GATS) represents a broad and ambitious
strategy of the ‘free market’ capitalist global economy to increase trade liberalisation in the services industry. The discourse of the GATS serves as a major potential force in essentially enshrining or entrenching neo-liberal educational policies (Grieshaber-Otto and Sanger, 2002). It sets out supra-national and binding legal mechanisms and serves to act as an enforcer for the corporate rights of private education and health providers. There is more literature available on the affects the GATS would have on education than on health (Robertson et al., 2002, Mundy and Iga, 2003, Dale, 2000, Ginsburg et al., 2003).

**Restructuring Education**

Altback (1991) suggested that there was convergence in education systems around the world and Schugurensky (1999) noted that this trend was intensifying due to technology and the movement of people. Andy Green (1997) however interjected that while there is convergence at policy rhetoric level about objectives, there is less evidence of any systematic convergence at ground level, for instance educational structures and processes in different countries. More recently others have turned their attention to the matter (Dale, 2000, Edwards and Usher, 2002, Hatcher, 2001). Edwards and Usher highlight the way globalisation presents ‘opportunities and challenges for education’, while Dale sees danger in opening up education to the free market. Possible implications of the GATS are also addressed (Grieshaber-Otto and Sanger, 2002, Robertson et al., 2002). Slaughter and Leslie (1997:25) argue that “policy makers in most English-speaking countries interpreted the real or imagined implications of globalisation for the restructuring of Higher Education in remarkably similar ways”.

Dale (1999) compares the mechanisms through which the external effects on national education systems are carried and delivered – borrowing, teaching, learning, harmonization, dissemination, standardization, installing interdependence and imposition - also known as ‘global spread’.

At a European level, Novoa and Lawn (2002) state they are trying to address the lack of significant literature within the broad area of the social sciences about new ways in which education is being formed in Europe, although noting there is literature focusing on particular educational areas such as the curriculum (Meyer et al., 1992) or exclusion (Popkewitz and Lindblad, 2000). They write the EU has been and continues to develop an educational space since the 1970’s but it has been overtaken by the new international neo-liberalism. So the EU is trying to develop its own distinctive voice while sharing the international discourse.

The 1999 Bologna plan aims to ‘harmonise’ EU degree structures, with the goals being mobility and transferability within the EU, and to create a European Higher Education Area’ by 2010, enhancing the employability and mobility of European citizens, and making EU universities competitive internationally. The Lisbon declaration of March 2000 is part of the EU educational strategy to achieve a knowledge society and a Eurydice document, *The teaching profession in Europe: Profile, trends and concerns* outlines the aims, ‘Europe’s education and training systems need to adapt both to the demands of the knowledge society and to the need for an improved level and quality of employment’ (Eurydice,
Strengthening the effectiveness and equity of education is a top priority for European policy-makers. Dale (2003) sees the 2000 Lisbon Declaration as emblematic of the rapid move in the direction to a European Educational Space, advocating decentralisation which could then pave the way for privatisation. The institutions of the EU among others have produced literature on comparative educational systems in Europe e.g. (European Union: Committee of the Regions and Commission, 2002, Council of Europe, 1989, Council of Europe, 2000, Novoa, 2000, Novoa and Lawn, 2002, OECD, 2003, McAdams, 1993).

Martin Mclean has distinguished two approaches to the curricula across Europe. Centralist countries that look to a EU wide core curriculum and centrifugalist who look to diversity of cultures across the EU continent and seek to incorporate these wide ranging elements into the curriculum. Centralists strongly identify with Maastricht and the need for harmonization of curricula across Europe and a federal united Europe. Meanwhile Meyer et al. (1992) in School Knowledge for the Masses charts the development of the ‘world primary curriculum.’ They describe the 19th century development of the modern curriculum which occurred in European centres ‘spreading outwards in waves of imitation’. The 20th century changes seem to reflect the dominance of the models of metropolitan powers and especially the hegemonic US.

Restructuring also involves negotiating the intensification of labour mobility. Istance et al., (2002) note there are two models for states – (1) the multicultural approach of a common school (2) or where the state allows community groups to create knowledge institutions with public funds, so each community socialises its children and transmits knowledge the way it chooses. This assumes that market relations are enough to keep an increasingly divergent society working together successfully. But the authors cast doubt on this and note the importance of shared common experiences for constructing social capital. Visibility of different peoples is increased due to their concentration in metropolitan areas and in a few regions (Massey et al., 1998). In a world of uncontrolled, confusing change, “people tend to regroup around primary identities: religious, ethnic, territorial or national. The search for identity, collective or individual, ascribed or constructed becomes the fundamental source of social meaning” (Castells, 1998:2).

An OECD Report on Attracting, recruiting and retraining staff (Ross and Hutchings, 2003 March) covers the issue of teacher supply and compares the non-graduate routes into teaching in Holland and the UK. It notes that many countries experiences shortages and that often teachers are actually more respected than they perceive themselves to be.

Restructuring Healthcare
As with education, there are also strong advocates against theories of convergence in health care policy contents and policy aims (Jacobs, 1998). Rico et al (2003:592) examine restructing in European Health care, specifically looking at Primary Care and offer another conclusion, “selective path dependency might apparently be compatible with a general trend towards convergence understood as hybridization.”
A European Commission funded book by Sen (2005) *Restructuring Health Services: Changing Contexts and Comparative Perspectives*, presents a collection of essays exploring recent experiences in four regions of the world - 1) the USA; 2) Western Europe - with case studies on Spain, Italy and the UK; 3) developing countries - with case studies on Malaysia, Thailand and India; and 4) Cuba. Sen argues that private health care has been enriched through both direct and indirect subsidies from the public purse without necessarily improving overall health care provision. This work also examines international influences on national policies (The impact of the WHO, multinational companies (MNCs) and the EU). Data is presented that as the power of MNCs has grown in all areas of health care - including hospital services, catering, cleaning, laboratory work, and health insurance - so also has instability in the workforce. Case studies are presented to cover specific experiences in health care reform from more than eight countries for example showing that Spain, the UK and India have undergone similar patterns of reform.

Dent (2003) examines how new managerialism has impacted on the professions of hospital medicine and nursing across eight European countries and questions assumptions of convergence. However he identifies a trend undermining medical dominance as well as traditional cultural forces inhibiting nurse professionalisation. An institutional analysis explains how welfare states have reformed hospitals and health professions with varying degrees of success.

Freidson’s (1990) conceptualisation of the possibilities for organisation of different health care systems sees three ways of conceiving public sector work – 1) the free labour market; 2) the rational–legal/bureaucratic labour market (i.e. managers) or 3) the occupationally controlled labour market (i.e. professions). Most welfare services are a mixture between these models and each tends towards a different sort of emphasis and outcome, but he concludes that overemphasis on cost and standardisation, thrive at the expense of collegial and client trust. Others writers have classified welfare states by how women friendly they are (Daly and Rake, 2003, Siaroff, 1994).

FAME (Kirpal, 2003) (Vocational Identity, flexibility and mobility in the European Labour Market) an EU 5th Framework project, looks at nursing in Germany: France, England and Estonia and found restructuring effecting work organisation and Human Resources (HR) policies.

In *The European Patient of the Future*, Coulter and Magee (2003) examine reforming health care systems in Europe and developments in information technology and biotechnology. This work reports the results of a study carried out in eight different European countries examining health policy from the patient’s perspective. Drawing on literature reviews, focus groups and a survey of 1000 people in each of the eight countries, the book addresses the following questions: Why might the patients of the future be different?; What will patients and citizens expect from health systems?; Will the public be willing to pay more for better health care?; What kind of value trade-offs are people prepared to make, for example between prompt access and continuity of care, or between choice and equity?; How will patients access information, advice and treatment?
Ethical and Professional issues in Nursing: Perspectives from Europe (Tadd, 2004) explores issues in European Nursing. It covers the development of EU minimum standards for the education of professional nurses since 1977, making freedom of movement a reality. Another issue raised is the WHO conference in Vienna in 1989, where a decision was reached to pursue the development of the generic nurse. This has proved to be a fundamental threat to the maintenance of the pre-registration branch education programmes in mental health, learning disabilities and paediatric nursing. Other chapters cover current issues in nursing, such as the emphasis of evidence-based practice and increase in multi-disciplinary team working. They also note there is a North/South divide in Europe with regards to the concept of ‘nurse advocacy’. This trend (starting in the US civil rights movement and moving onto institutionalised patients for example those in mental institutes) can be seen as an impetus to nurse autonomy. But the Northern European idea of nurses ‘protecting’ patients from doctors does not seem to be shared in Southern Europe. In Spain the idea of patient advocacy seems to have been taken on jointly by doctors and nurses, in a less confrontational manner. Another chapter of this book notes the current trends in nursing of homecare and primary care expansion, increase in unqualified staff, use of IT and concern over costs, delivery and quality of care as well as the increased involvement of patient and consumer groups. It also describes the various nursing research organisations in Europe and notes there are about twenty nursing groups active across Europe.

The Workgroup of European Nurse Researchers (WENR) who network for the advancement of nurses, have recently published a position paper (Perala and Pelkonen, 2004) and are one of the oldest groups having been established in the 1970’s.

The WHO published a report on the role and functions of nurses and midwives within the health systems of European countries including countries of central and eastern Europe (CCEE) in response to the paucity of reliable data on nursing practices in Europe (Salvage and Heijnen, 1997).

In Health, migration is an issue with England and Ireland in particular experiencing staff shortages and recruiting nurses from Spain and Finland while an OECD report (Simons et al., 2005) concludes that nurse shortages are an issue across developed countries. To cope with the ethical issues of creating brain drains in developing countries, international recruitment policy documents have been introduced at national and supra-national levels (Commonwealth Secretariat, 2003, International Council of Nurses, 2005, Aiken et al., 2004).

The Professions and Restructuring

Representations of professions in the literature will now be examined and the implications of restructuring on them. The concept of profession can have different connotations across languages for example, in Finnish ‘profession’ (professio) is a new word and is not used in everyday communication.

“The essential properties of professions must not be decided by how the concept is used in English. It is argued that essential properties must
instead be connected with knowledge (abstract knowledge) and both education and certificates have been discarded as the basis for the groups which ought to be considered. These groups may be called `knowledge-based groups.'” (Burrage and Torstendahl, 1990: 59)

Early writers on professions sought to identify the differentiating criteria of professions, based on classifications of their strategic aims, historical development or lists of essential properties. Parsons (1968) argued that the professions in the USA were ‘functional’ for society and played a crucial role in ensuring social stability and growth. He gave the term “functional specificity” to the way certain people, such as doctors have authority in certain realms but in not others and concluded that people working in business and ‘ vocations’ have the same sorts of motivation and the system is maintained by a complex balance of diverse social and institutional forces.

Etzioni (1969) identified a lower level of jobs, he named the semi-professions of which teachers and nurses belonged. He identified doctors, lawyer, academics and the clergy as the major professions (demonstrating how professions are historically based and their status rests on their social legitimacy in society).

Glazer (1974) argued that professions such as social work, education and town planning are caught in a hopeless situation. These ‘minor’ professions have tried to substitute a basis in scientific knowledge for their traditional reliance on experienced practice. He believed their aspirations were doomed to failure as they lacked the essential conditions of the major ones – stable institutional contexts of practice, fixed and unambiguous ends and a basis in systematic scientific knowledge.

By the 1970’s, literature on professions began to look at the strategies used by different groups to achieve a certain social status as a “profession”. Larson (1977) is well known for his detailed historical study of Britain and America that showed how professions created a market for their services, achieved a political mandate for having exclusive rights for their service or practice and could then enhance their status and power. These later writers rejected the earlier views as essentialistic and instead saw professional ‘ closure’ (Weber, 1968) as a monopoly strategy that could be compared to caste systems (Collins, 1987). Academic requirements were seen as a form of credentialism which conveniently creates artificial shortages.

Cultural capital theory also sees professions as devices to maintain the advantage of higher social classes. Long training means professions are monopolised by certain groups while at the same time legitimising ideologies of the ‘equal opportunities’ of educational systems obfuscates the reality (Bourdieu, 1986).

Collin’s (1987) historically orientated definition that professions are “socially idealized occupations organised as closed occupational communities” (Burrage and Torstendahl, 1990: 205) can be seen to be useful. Burrage and Torstendahl’s (1990) Professions in theory and history: rethinking the study of professions covers the historiography of professions and argues that attempts to
formulate a universal definition of profession should be abandoned, as each profession has a specific identity and claims to legitimacy.

Friedson’s 2001 work conceptualises professionalism by treating it as an ideal type grounded in the political economy. He sees it as the third logic – as opposed to the other organisational options - marketisation or bureaucracy. He advocates professional autonomy as the best model. Le Grand (2002) sees the division as one between markets, hierarchies or networks.

Evetts (2005) emphasises how the notion of professionalism is increasingly used in a whole range of jobs while paradoxically the conditions of trust, discretion and competence which historically have been deemed to be necessary for professional practice are being challenged, changed or regulated. Employees are encouraged to self-define themselves as possessing professionalism and this encourages self-motivation (and self-exploitation). Evetts coins this management appropriation of the term as ‘organisational professionalism’ and contrasts it to ‘occupational professionalism’ which is a discourse constructed from within professional groups.

A recent analysis from Beck and Young (2005:188) analysing restructuring of academic and professional identities from a Bernsteinian perspective defines professions in terms of the following concepts:- 1) They have a large measure of collective collegiate autonomy over their conditions of professional training, certification of professional competence and conditions of work and practice due to their claim to expert knowledge. 2) Professions largely define the boundaries of their own knowledge base, which in most cases is institutionalised in the form of a curriculum taught by a ‘professional school’ based within an institution of higher education. 3) Professions are trusted by the State to develop and implement codes of ethics through which they could be held to account. 4) Their training involves specialist expertise, intensive socialisation in the values of a professional community and its standards of professional integrity, judgement and loyalty (or the creation of a professional habitus).

An associated topic with its own large literature concerns the different research methodologies used to generate hierarchies of occupational prestige and status and analyse social mobility. The methodology of Standard International Occupational Prestige Scales (SIOPS) is used by Ganzeboom and Treiman (1996) who, among others show that occupational hierarchies are fairly stable over time and across different cultures, with the professions of medicine and law consistently ranked at the top of the hierarchy. However this methodology is criticised as for example by Berkman and Macintyre (1997) who find professions are not stable over time and dispute the SIOPS indicators used as being based on the occupational structures of the 1950’s and 1960’s, and ignoring changed job rankings and requirements.

Various authors have written about the effect of restructuring on professions. Sennett (1998) explores how restructuring has changed the working world from a place of rigid hierarchical organisations where what mattered was personal character and contrasts it with the brave new world of corporatism where risk is re-engineered; flexibility, networking, short term team work and self re-
invention are what matters. He sees the risks and costs of business passed down to the casualised employees, contractors and consumers while ‘fat cats’ make the profits in companies such as Enron while the cost to society’s non-favoured is an explosion of drug-taking, suicides and mental illness. ‘Detachment and superficial co-operation’ replace the values of loyalty and long-term service.

Krause (1999) examines the medical, legal and engineering professions and university teachers in America, the United Kingdom, France, Italy, and Germany. He writes that in the past 30 years each professional group in each country has experienced a marked decline in its powers in relation to the state and to capitalist institutions. He finds that greater capitalist control means the professions operate more on a for-profit basis. Powers, such as control over work conditions and training peaked by the late 1950’s and early 1960’s. After that, Krause’s social historical comparison shows, their power has been reduced and this has meant fewer benefits for consumers as providers respond less to consumer needs and more to the priorities of capitalists. By surrendering their non-capitalist values, the professions become no different from other occupations.

**Professional Knowledge and Restructuring**

Representations of professional knowledge in the literature will now be examined and implications of restructuring. Knowledge has been the subject of investigation since classical times and there are multiple ways of dissecting the idea of “knowledge” for example technical versus practical (Oakeshott, 1991) knowing that versus knowing how (Ryle, 1947) propositional knowledge versus procedural knowledge or comprehension (knowledge about) versus apprehension (knowledge from direct acquaintance) (Kolb, 1984). Knowledge can also be seen as tacit (Polanyi, 1967, Eraut, 2000) versus explicit. A social understanding of knowledge production emphasises the distinction between the logic of theory and the logic of practice (Bourdieu, 1980).

Interest in professional knowledge has been growing in recent years with the currency of discourses of competition in a global economy creating the need for ‘knowledge societies’ and ‘knowledge management’. However, the idea of an economy based on knowledge is not new; some references to the role of knowledge in economic processes date back to the first half of the century (Schumpeter, 1934, Hayek, 1945, Machlup 1962). But it was only in the later years of the 1960’s, that knowledge was recognised as critical to economic development. Drucker (1969) described the shift from a society based on manual labour and skills to one based on knowledge work, along with its social, economical and political implications. In *The Coming of Post-Industrial Society*, Bell (1973) described a move from a labour-intensive industrial economy to one based on information-driven provision of services. Bell describes the birth of a new society in which scientific and technical knowledge play a decisive role in all spheres of cultural life. He predicted the emergence of an intellectual, science-driven elite that would run society according to social processes based on educational talent and merit.
Lyotard (1979) also anticipated how changes in society would affect professional knowledge. He saw that knowledge itself was gaining centrality as a factor of production and been transformed into a commodity. Lyotard demonstrates how the use of technology means that tacit knowledge is undervalued in a performativity culture – where efficiency and performance is central and professional knowledge is unimportant.

In Knowledge Societies, Stehr (1984) argues that it is the structural changes in economies that bring major changes in the nature of work, in social institutions, and in cultural values. The idea of a ‘learning organisation’ has also become familiar since Senge (1990) published his Fifth Discipline, using "systems thinking” as the primary tenet of a revolutionary management philosophy to ‘expand the ability to produce’.

Drucker argues in his 1993 work, The Post-Capitalist Society, that knowledge has been the basis of capitalist society from the very beginning. The critical feature in the current revolution is that knowledge is now being applied to knowledge itself, instead of to tools and products as was the case of the industrial revolution of the 18th century, and to human work and production processes, as in the productivity revolution of the early 20th century. Management, to him, is essentially knowledge work. In the case of the post-capitalist society, the workers being managed are no longer manual workers, but knowledge workers.

Beck and Young (2005) use Bernstein’s ideas to reflect on restructuring of academic and professional identities. They explain how Bernstein found ‘regionalisation’ or genericism in all areas of education and training (characterised by terms such as key skills, core skills and team work). Emphasis on genericism is seen as crucial in a working world of changing careers and ‘short-termism’. Bernstein contends restructuring and marketisation is altering the very concept of knowledge and fundamentally undermining core elements of academic and professional identity. “Knowledge, after nearly a thousand years, is divorced from inwardness and literally dehumanised...what is at stake is the very concept of education itself.” (Beck and Young, 2005:184)

Stoer and Magalhaes argue that network societies have changed knowledge and they feel the emphasis on competencies condemns people to being individuals, filled only with empty knowledge that is reduced to through-put.

“Knowledge has become reconfigured as a communicational and informational network and assumed a central place in the productive process. This tension has been translated in the educational debate into opposition between educating for competencies and education for the formation/development of the individual.” (Stoer and Magalhaes 2004:331)

Stoer and Magalhes (2004) also discuss the role of the internet and conclude that knowledge is moving away from institutions into the community. Edwards and Usher (2002) argue that the concept of life-long learning unsettles education as the pre-existing object of knowledge/reference.
There is a huge literature and a plethora of theories about methods of gaining professional knowledge. Habermas describes knowledge as socially constructed and tied to structural interests. His construct of ‘knowledge constitutive’ differentiates three primary generic cognitive areas in which human interest generates knowledge - work, interaction and power. Work broadly refers to the way one controls and manipulates one's environment. This is commonly known as instrumental action - knowledge is based upon empirical investigation and governed by technical rules. The practical domain identifies human social interaction or 'communicative action'. Social knowledge is governed by binding consensual norms, which define reciprocal expectations about behaviour between individuals. Social norms can be related to empirical or analytical propositions, but their validity is grounded 'only in the intersubjectivity of the mutual understanding of intentions'. The emancipatory domain identifies 'self-knowledge' or self-reflection.

Schon (1983) introduced the concept of reflection-in-action as a means by which professional knowledge is brought into the realm of professional decision making. Constructivist theories state that by ‘reflecting’ on our experiences, we construct our own understanding of the world we live in. Each of us generates our own rules and mental models, which we use to make sense of our experiences. Schon’s idea of the ‘reflexive practitioner’ has been influential from the 1980’s.

Lave and Wenger’s (1991) model of situated learning in a ‘learning community’ sees learning as social participation rather than the acquisition of knowledge. It is not so much that learners acquire structures or models to understand the world, but they participate in frameworks that have structure. Learning involves participation in a community of practice. Lave and Wenger illustrate their theory on observations of different apprenticeships (Yucatec midwives, Vai and Gola tailors, US Navy quartermasters, meat-cutters, and non-drinking alcoholics in Alcoholics Anonymous). Initially people have to join communities and learn at the periphery. As they become more competent they move more to the ‘centre’ of the particular community. In this there is a concern with identity, with learning to speak, act and improvise in ways that make sense in the community.

Social Cognition learning theory states that culture is the prime determinant of an individual’s development. Humans acquire professional knowledge through culture and at the same time, culture provides the tools of intellectual adaptation. In short, culture teaches what to think and how to think (Vygotsky, 1962). Activity theory is an interdisciplinary approach to human sciences that originates in the cultural-historical psychology school of thought, initiated by Vygotsky and others. Activity theory takes the object-oriented, artefact-mediated collective activity system as its unit of analysis, thus bridging the gulf between the individual subject and the societal structure. Using this theoretical background, Engstrom (1998) brings together contributions from researchers from various social science disciplines to investigate workplace learning, professional knowledge and activity in ways that do not reduce it to a "psychology" of individual cognition or to a "sociology" of societal structures.
and communication. Practices and communicative interaction are examined as situated issues at work in the reproduction of communities of practice in a variety of workplaces including: courts of law, computer software design, the piloting of airliners, the coordination of air traffic control, and traffic management in underground railway systems.

Some argue with the massification of Higher Education, the role of the university in validating professional knowledge is being challenged. Professions can also be seen to have been threatened by postmodernists and social constructionist ideas which reject the idea that professional or academic knowledge can make any kind of well founded claim to objectivity. Gibbons et al. (1994) discuss the changing character of knowledge production. Mode 1 knowledge production comes from a disciplinary community within a university, for example PhDs. The legitimacy of such knowledge is determined by the university, academics, academic journals that disseminate the knowledge and the career paths that are attached to it. Mode 2 knowledge is the identification and solution of practical problems in day-to-day life. It is not focused on academia and is concerned with trans-disciplinary problem-solving.

Istance et al. (2002) note how the production of knowledge has moved away from the education sector and is now carried out everywhere with businesses in recent years focusing on knowledge management in a learning society. Global markets determine the value of types of knowledge and universities struggle to compete nationally and internationally with the private sector in recruitment of knowledge-producing staff and maintaining the capacity for cutting edge research. They write that countries demand knowledgeable citizens and parenting in the global economy demands much more information from the adults. This means investment in early years education may need to increase and the development of a worldwide standards movement to improve the performance of low-income students.

Implications for teachers and their professional knowledge
This next section concentrates on specific literature about restructuring the teaching profession and its professional knowledge. Hall (2004) believes there is widespread agreement amongst educational commentators about current trends in teaching work in developed countries. These trends are seen as the de-professionisation, de-skilling and intensification of teachers work and are well documented in (Apple, 1982, Goodson and Hargreaves, 1996, Harris, 1994, Lawn, 1996, Troman, 2000, Easthope and Easthope, 2000, Apple and Jungun, 1992).

Hall (2004) analyses theories of change in teachers work and how this affects autonomy. She outlines Bravermans’ (74) Labour Process Theory, where deskilling is a deliberate strategy to divide work to increase profit and how the capitalist industrial labour process tends to force labour to become fragmented and de-skilled especially about the between conception (mental labour) and execution (manual labour). She describes how Smyth et al. (2000) adapt Braverman’s Labour Process theory and use it to demonstrate how teachers are controlled in six ways:-
1) Regulated Market control: metaphors of the market and consumer demand are imposed upon schools: success and profits go to those who best meet consumer demand. Competition is a key element in relations between schools (Ball 1994).
2) Technical control: this is embodied in structures rather than people - e.g. Apple’s ‘teacher proof’ teaching materials and text books and byte-sized delivery methods (Apple and Jungun, 1992).
3) Bureaucratic control: Hierarchical power is embedded in the social and organisational structure of institutions - jobs are differently divided and defined, have different salaries, and supervision, evaluation and promotional arrangements. The potential for establishing a career operates as a control mechanism.
4) Corporate control: the focus is of the institution with the head teacher as line manager and on economic rather than social good.
5) Ideological control: hegemonic beliefs such as a good teacher has certain characteristics - become part of the dominant ideology within schools. These ideas are reinforced by training.
6) Disciplinary power: (Foucault 77) shows how the technologies of power - hierarchical observation, normalising judgement and examination - ‘discipline’ individuals into ways of understanding their work. Smyth et al. describe this as a ‘triumph of technique over questions of purpose’. (Hall, 2004)

Harris writes that the identity of teachers is socially constructed and in much of the Western world this identity has become one of decreased status and control. Teachers are experiencing a loss of autonomy, worsening of conditions, loss of purpose and direction, destruction of health, increased anxiety and depression, lowering of morale and despite a continued proliferation of policy rhetoric to the contrary, subjugation to increasing government and other external controls of schooling and curricula (Harris, 1994:5).

Goodson and Hargreaves’ Teachers’ Professional Lives (1996) highlights the differences between professionalism (which defines the quality and character of people’s actions) and professionalisation (which aims to enhance the interests of an occupational group). They identify 5 different kinds of teacher professionalism:

- **Classical** - based on specific knowledge (e.g. incorporating Shulman’s (1986) ‘pedagogical content knowledge’ or knowledge of how to teach your subject)
- **Flexible** - based on the development of cultures of collaboration
- **Practical** – tries to give dignity and status to practical knowledge and judgement with experience and situated knowledge being of prime importance (e.g. Brown and McIntyres’ (1993) notion of ‘craft knowledge’ as well as Schon’s reflexive practitioner.
- **Extended** - refers to the increasing roles that teachers now have to fulfil such as peer-coaching, team working, partnership mentoring and contractual relationships.
- **Complex** – referring to the discourse of teacher professionalism based on the complexity of teaching work such as planning and assessment.

They suggest that the future may lie in postmodern professionalism (Hargreaves, 1994) or interactive professionalism.
Hargreaves (1994:47) characterises the role of the teacher in a changing society as the move from modernity - with its emphasis on mass production, expansion, central decision making - to post modernity - with its emphasis on flexibility, responsiveness, decentralised decision-making and compression of time and space. He notes the paradoxes and perversities of education policies and how “Globalisation can lead to ethnocentricism, decentralisation to more centralisation, flatter organisational structures to concealed hierarchical control.”

Holye and John (1974) use the classifications of restricted professionality (experience) and extended professionality (experience and theory gained from literature and training). Goodson (2003) compares how classical professionalism (academicisation) versus practical professionalism (the market replaces academic obfuscation as the route to professionalisation and teachers give up powers of definition and autocracy, but are rewarded in the market with financial incentives, bonuses and payment by results for selected leaders and managers.) Nias used the term ‘bounded professionality’ to describe this extension of work (Nias, 1989).

Literature also attempts to analyse how teacher knowledge is changing. Traditionally, teachers’ professional knowledge rested on knowledge of their subject. But teaching knowledge can also be seen as divided between knowledge of content and knowledge of transmission. Teacher knowledge may have a variety or origins including practical experiences, such as day to day practice and formal schooling in the past, higher education or professional training. The Action-Research Movement (Stenhouse, 1975) with its idea of knowledge as context-specific led to various taxonomies trying to explore teachers’ knowledge. Verloop (2001) describes how labels have been used, each emphasising a relevant aspect of teacher knowledge. He notes the most commonly used labels are ‘personal knowledge’, indicating that knowledge is unique, ‘the wisdom of practice’, ‘professional craft knowledge’ (Brown and McIntyre, 1993) referring to a specific component of knowledge that is mainly the product of the teacher’s practical experience and ‘action-orientated knowledge’ (Carter, 1990).

Furlong (2000) described the rise of 3 alternative conceptions of the role of knowledge with respect to teaching:-
1) Reflective practice (following Schon (1987) and focusing on knowledge that is embedded in the practice of professionals)
2) New rationalism (following Hirst) that tries to develop forms of practical rather than theoretical knowledge, that can then be experimented with.
3) Critical theory.
Furlong contended that all these approaches concentrate on a conventional definition of professional knowledge and he suggests using ‘intuition’ as a new concept.

Coffey charts the substantial and significant changes that education systems have undergone over recent decades, and places them within a broader context of social change. She feels that marketisation undermines ‘pure knowledge’ (Coffey, 2001).
Implications for Nurses and their professional knowledge

This next section concentrates on specific literature about restructuring and the nursing profession and its professional knowledge. Access to accurate accounts of what nurses do in their respective jobs across Europe is extremely limited. One book that gives a summary of nursing history and practice across European countries as well as at a European level is *Nursing - the European Dimension* (Dame Quinn and Russell, 1993). The notion of ‘profession’ in nursing is controversial. ‘Owning’ a body of professional knowledge is difficult in such a highly specialised profession. Added to this there has been a major shift in decision-making within Health Care from when professionals ‘knew best’ and patients deferred to their professional knowledge and judgements (Coulter, 2002, Muir-Grey, 2002).

In *Nursing Against the Odds: How Health Care Cost Cutting, Media Stereotypes, and Medical Hubris Undermine Nurses and Patient Care*, Gordon (2005) examines how in the United States and throughout the industrialised world, nurses are dropping out of health care’s largest profession. She identifies a world wide nursing crisis. Gordon examines how health care cost cutting and hospital restructuring undermine the working conditions necessary for quality care. She shows how the historically troubled workplace relationships between Registered Nurses (RNs) and physicians become even more dysfunctional in modern hospitals. In Gordon’s view, the public image of nurses continues to suffer from negative media stereotyping in medical shows on television and from shoddy press coverage. Gordon pays particular attention to the discourse of caring, its origins and its political and social impact. She cites Sioban Nelson and others on the ways in which this discourse works to marginalise nurses’ expert knowledge and skills in favour of reinforcing gender stereotypes by emphasising their apparent virtues.

In *The Nurse: Autonomous Professional or Subservient Worker?* Scott (2004) analyses the positionality of nurses in Europe. She argues that autonomy is:- not synonymous with freedom of action or independence; it is a quality of a person rather than a right to which one may lay claim; influenced by internal as well as by external constraints. She finds there is a tendency to confuse autonomous practice with moral autonomy and believes that nursing has some way to go in terms of professional maturity before it can be claimed that they are autonomous professionals.

Gasull (2004) explores inter-professional relationships of nurses across Europe, with Spain and the UK in focus, and draws attention to the growth in team working. She writes the explosion of knowledge that came about in the last century has made it impossible for a single professional to possess all the knowledge and abilities necessary to cure or treat an individual. Meanwhile, nurses are unwilling to play the ‘Doctor/nurse subservience’ game anymore, while doctors have not recognised this fact.

Brenner’s (1984), *From Novice to Expert*, is one of a series of seminal texts examining the professional knowledge of nurses in America. The book uncovers the knowledge embedded in clinical nursing practice and uses the Dreyfus model
of skill acquisition applied to nursing as an interpretive approach to identifying and describing clinical knowledge, nursing functions, effective management, research and clinical practice, career development, education and practical applications. Eraut also examines (1994) the issue of how to evaluate nurse competency.

Rafferty (1996) describes ‘new knowledge regimes’ (health economics, health services research and evaluation or outcomes research) which started in US in 70s and have come to Europe via various consultancies and organisations set up to promote the ideas. Focusing on auditing has led to the biomedicalisation of knowledge in medicine - probabilistic knowledge is used to improve clinical performance and replaces individual professionals’ knowledge as the foundation for clinical decision-making. So managed heath care – delivering of health care in a way that also manages costs - changed health knowledge and the meaning of medicine and care. Evidence based medicine (EBM), clinical practice guidelines (CPG) and health technology assessments (HTA) represent ‘best practices’ as opposed to other kinds of evidence, such as personal experience. Rafferty also notes that the excessive paperwork is said to be for quality assurance but it also plays a role in a culture of surveillance and blame.

Nursing is often seen as a profession trying to free itself from the ruling hegemony of male doctors. Some nurses have attempted to articulate a form of nursing that incorporates perceived gendered knowledge and skills, such ‘presencing’ (Brenner, 1984) and therapeutic nursing. However, these gendered skills are not exclusive to nurses and pursuing this approach to defining nursing work and achieving professionalisation can be seen as problematic. Others have focussed on professional knowledge as caring. Hochschild (1983) writes that emotional labour involves the induction or suppression of feeling in order to sustain an outward appearance that produces in others a sense of being cared for in a convivial safe place. Smith (1992) notes there seems to be a link between giving emotional labour and occupying the lowest status.

National Literature Reviews of Restructuring
Periodised literature reviews from Finland, Sweden, Greece, Portugal, Spain, Ireland and England will now be presented. Further ProfKnow work packages aim to study the different generational attitudes and identities of teachers and nurses and so attempt to elicit information on the impact of restructuring in the ProfKnow countries.
Chapter 2

Research Review of Restructuring in Health and Education in Finland

Erja Moore, Ari Antikainen & Toni Kosonen

Introduction

The focus of this research review is the conjunction of two basic areas of research in Finland: firstly the restructuring in education and health care, and secondly, professions and professional knowledge of nurses and teachers. The research review is based on literature searches in Union Databases and National Bibliography of Finland (Linnea Union Catalogues 2005). Finnish National Bibliography (FENNICA) contains references to monographs, serials and non-book material published or in other way produced in Finland. It also includes publications published outside Finland but with a Finnish author or related to Finland (Fennica Database 2005). In addition, the research review is based on searches on international academic databases for articles published for international audience and a search on the publications of universities that provide education and conduct research in education science, nursing science and social sciences.

The research review provides information of the research conducted in Finland on the restructuring of the welfare state especially in the area of education and health care, and issues related to the profession of nurses and teachers. The amount of research is extensive and thus this review focuses mainly on publications that are either doctoral dissertations or results produced in research projects. As there are limitations with regard to the extensiveness and length of one national research review, only a few theses produced on the level of Master’s education have been included in this review.

Research on restructuring of the welfare state and the public sector, and the effects of restructuring on organising education and Health Care have been conducted in many fields of science (e.g. economics, social policy). In these studies nurses and teachers are present as groups of professionals among other professional and occupational groups. Most of research on the teaching profession is carried out within the faculties of education in universities. The nursing profession has been studied by sociologists and within nursing science. A few cross-professional studies on professionalisation have been carried out (e.g. Konttinen 1991; Rinne & Jauhiainen 1988; Haapakorpi 2002). There is quite a large body of research on teachers and teaching on all levels of education including pre-primary, primary, secondary and higher education and adult education. The focus in this research review is on teachers and teaching in comprehensive schools. Nurses and nursing have also been studied to some extent the research within nursing science focusing, however, not on the
occupation itself, but rather on special issues within nursing (e.g. nursing of patients suffering of certain illnesses, pain relief, rehabilitation, etc.).

Most of academic research is conducted in universities or related research institutes. There are also other providers of research and statistics. Ministry of Education and Finnish National Board of Education provide data on the Finnish educational system (and teachers) and Ministry of Social Affairs and Health provides information about Health Care (and nurses). In the area of Health Care, National Research and Development Centre for Welfare and Health (STAKES) is an important provider of different kinds of statistics, analyses and research within its area. Research about nurses is usually provided in studies that cover all the professional and occupational groups working within Health Care. Another provider of research on professional groups is the Finnish Institute of Occupational Health (Työterveyslaitos, TTL). (Ministry of Social Affairs and Health 2002.) The Finnish Association of Nurses (Sairaanhoitajaliitto, SHL) is the professional association of nurses, and it finances research on the work of nurses. The Foundation for the Areas of Teaching and Education (Opetus-, kasvatus- ja koulutusalojen säätiö OKKA) organises research among other issues on teachers. The labour unions, The Union of Health and Social Care Professionals (TEHY) for nurses and Trade Union of Education in Finland (Opetusalan ammattijärjestö, OAJ) for teachers also regularly conduct research on their members.

This chapter is divided into four sections. The first is a short review of research on restructuring of the Finnish welfare state, focusing on the areas of education and health care. The second section deals with research on nurses: history of the occupation, nurse education, changes in the work of nurses, and nurses’ professional position and professional knowledge. The third section covers research on teachers: history of the profession, teacher education, content of work, and teachers’ profession and professional knowledge. In the fourth section we conclude with some remarks about the changes in the content of research in the areas presented in this review as well as some notes about the change in methodology.

The Finnish welfare state and restructuring in education and health care

The Finnish welfare state is based on belief in universality of rights and redistribution of wealth. The extensive public provision of health care and welfare services has been one of the characteristic features of the Finnish welfare regime (Simpura et al. 2001, 131). Municipalities provide their citizens with basic public services. The most important of these services are education and social and health care services. In research, restructuring refers especially to the changes of the welfare state, and research on restructuring focuses on changes that began in the 1980’s and became stronger in the 1990’s.

For generous and extensive welfare programmes and services high taxes are needed. Education and health services are most exclusively provided by the public sector, they are largely tax-financed and user fees contribute only marginally to the financing of these services as they are usually free of charge.
The services are available to all citizens on the basis of need. The principle of self-government is stronger in Finland (and Sweden) than in most other states in Europe. Municipalities are legally responsible for providing services for their residents. The share of private service provision is low (Timonen 2003, 113-114; Simpura et al. 2001, 133-136).

The welfare state regime of Finland is referred to as social democratic, institutional, or encompassing. In the social democratic regime-type, all citizens are entitled to a wide range of universal and decommodifying benefits and services, and high employment levels are necessary in order to finance the extensive welfare commitments. The golden age of welfare state expansion was in the 1980’s, and at the time of the deep recession in the beginning of the 1990’s tendencies for restructuring strengthened. The welfare state was challenged by closer integration to global financial markets, ageing population, falling birth rates, and changes in family structures. Timonen (2003) sees a movement towards the Central European welfare state model in the 1990’s, when employee contributions were introduced or increased, some user fees were introduced in the service sector and the incidence of private insurance was getting higher (individual pension schemes, health insurances). A two-dimensional process worked in social and health service provision: the economic depression hit the Finnish municipalities as their tax revenues and state subsidies declined. At the same time several changes took place in the administrative structure of social and health services (Simpura et al. 2001, 136, 139). Even if restructuring has encountered the areas of education and health care, the overall structure of providing services has remained unchanged.

Municipalities finance welfare services by collecting local taxes and receiving state grants. The tax income for local authorities derives from the municipal tax, property tax and a portion of corporate income tax. The central government provides government transfers for the provision of basic services by municipalities. Government transfers are principally determined per capita and are universal in nature, i.e. local authorities are free to decide how to use the money. Differences in tax revenue between municipalities are equalised through the central government transfer system. The balance and predictability of the statutory tasks of municipalities is improved through the basic public services programme managed jointly by central and local government and its annual basic public services budget. Local authorities and inter-municipal authorities are expected to employ some 450000 people in 2005 (Ministry of Finance 2005).

The central government delegated more discretion to municipalities over their expenditure during the 1990’s. In the change from specific matching grants to general non-matching grants, municipalities have more freedom to allocate these grants. At the same time municipalities have faced increasingly heavy burdens of obligations (Timonen 2003). In education, decentralisation has been realised.

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2 In 2005, there are 432 municipalities in Finland.
3 State grants to municipalities were repeatedly and heavy-handedly cut throughout the recession in the 1990’s. In the 1980’s state grants provided nearly half of the funding needed for the services. State grants were cut by about 7% in 1992-1994 and by 10% in 1994, and income from municipal taxes declined about 10% in 1990-1992 (Timonen 2003, 114).
through moving the responsibility for compulsory schooling to the municipalities and schools by abolishing ear-marked money (Johannesson et al. 2002, 336). The earlier national curriculum for comprehensive schools was replaced by only guidelines in the 1990’s, which forced the schools and individual teachers to prepare the curriculum. However, there is now a trend back to state control in curriculum as Finnish National Board of Education prepared the new core curriculum for comprehensive schools that is to be used in all grades of comprehensive school starting at the latest at the beginning of autumn term 2006. (National Board of Education 2005).

Johannesson, Lindblad & Simola (2002) present the effects of restructuring in educational policies. Their article concerns discursive change in schooling in Finland, Iceland and Sweden. According to Johannesson et al. (2002), in the area of education Finland moved away from policies emphasising equity and the centralisation of decisions and planning towards opportunity to choose, deregulation, evaluation and managerialism (see also Rinne 2000).

The state grant reform in Finland brought a measure of competition into service provision, as municipalities were allowed to purchase services such as surgical operations from the cheapest or most efficient provider, be it a private enterprise or a hospital in a different district. Purchasing basic health care services from the private sector has become more common in Finland since the 1990’s, but the share of private services is still very modest in most areas of service provision. In health care professions, the privatisation tendency is much stronger in the area of medicine (doctors) than it is in nursing. Nurses have developed entrepreneurship in care for the elderly or care for substance abusers.

Simpura et al. (2001) have analysed the survival of the Finnish Health Care system. They noticed in their analysis that hospitals treating acute somatic diseases continued the growth of their output throughout the 1990’s, while sectors like home care of the elderly, care for substance abusers and psychiatric care experienced a marked decrease in the supply of services. Simpura et al. (2001, 143) state that it is evident that strong professions, strong institutions and influential user groups could protect their interests whereas weaker professions, weaker provider institutions and marginal or excluded user groups lost in the competition for scarce resources.

Assessments of the state of the Finnish welfare state vary. The expansion of the welfare state and the economy in the 1980’s was followed by the deep recession that had effects on welfare services. Simpura et al. (2001) analysed the strategies municipalities used in adapting to the changed finances. Among

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4 The results were produced within a wider EU-funded project EGSIE (see Johannesson et al. 2002, 338)
5 In Finland, league tables concerning the efficiency and productivity of comprehensive schools are not available. National sample studies in different school subjects and standardised ‘task banks’ are voluntarily available to grade 9 teachers (Johannesson et al. 2002). Outside the traditional research practices, the national commercial TV station, MTV3 has compared the results gained by students in different upper secondary schools in matriculation examination and ranked all the Finnish upper secondary schools to an order of performativity and results.
6 According to the Nurse Survey 2004 (Partanen et al. 2005) 0.5 percent of nurses are entrepreneurs.
municipalities they could identify the use of *re-argumentation strategy* within which the supply of services was changed. *A restructuring strategy utilising collective crisis awareness* was found especially in the provision of social services. In the changes in health service provision the *efficient strategy* was essential. According to Simpura *et al.* (2001, 162), a large number of important changes were noticed, but the basic structure and the main operating principles remained largely intact.

**Research on Nurses and Nursing in Finland**

**Periodisation of Restructuring in Health care in Finland**

The education of nurses has been organised and controlled by the state. Nurses have been, and still are, mainly working in municipal institutions either in hospitals providing care within specialised fields of medicine or in health centres that were established in the 1970’s according to the Public Health Law in 1972. Rinne & Jauhiainen (1988) in their extensive analysis of professions within the public sector also look at the development of the occupation of the nurse. Sorvetula (1998) presents a very thorough history of Finnish nursing dividing the history into three phases: the time before 1889 is a time before the education of nurses was established (time of pioneers), from the 1890s to the 1930s is time of creating the base for nursing and nurse education was created, and the third period from the 1930s to the 1970’s is time of developing nurses’ position and work practices, and the education of nurses. Henriksson (1998) who also deals with the development of nursing sees the time from the 1860s to the 1940s as a period of disintegration of the class society, the stabilisation of independence and slow construction of health care.

**1945-1960 - Reconstruction after the Second World War and creation of the base for the welfare state.**

In the 1940s nurses already had a legislatory base for their education. Specification of nursing into areas of hospital nursing and public health nursing had taken place, specification within the profession had continued and nurses were supervised by matrons and helped by assistants. Nurses were organised in two labour unions (one for Swedish-speaking nurses and one for Finnish-speaking nurses). The post-war time in the area of health care was time of expansion. More nurses were educated for the needs of tuberculosis hospitals and public health care services. The 1950’s changed the arrangements in health care profoundly as central hospitals throughout the country were founded, which added the need for educated nurses and assistants (Rinne & Jauhiainen 1988: 137, 156).

**1960’s and the 1970’s - Remarkable structural changes**

This era includes first the strengthening of specialised health care in central hospitals and secondly, the creation of a systematic primary health care service in municipalities after the Public Health Law in 1972. The Ministry of Social Affairs and Health was founded by combining earlier administrational structures of social welfare and health care (Rintala *et al.* 1997, 2). Nurses were educated in nursing schools and the courses lasted 2.5 years. Nurses were employed by the hospitals or municipalities only after graduation. Later the names of the
nursing schools were changed first to Educational Institutions of Nursing, and in the 1980’s these institutions changed their names into Educational Institutions of Health Care.

1980’s – Further centralisation
The administration and planning of welfare service provision including health care was centralised further in the 1980’s, and national five-year-planning was used in financing and organising the health care services. Stress was placed on the issue of gaining equity in health. Administrative change of combining social welfare and health care were carried out in municipalities mainly in the 1980’s (Rintala et. al. 1997).

1990’s – Efficiency and the move of nursing to Polytechnics
Pressure to increase efficiency in service provision in social welfare and health care increased in the early 1990’s (Lehto 1995). The education of nurses was moved to polytechnics established in the 1990’s as more practically oriented higher education institutions than universities (e.g. Nursing in Finland 2001). In health care, private care service providers have become more important in the welfare service structure and nurses have gained new career possibilities as entrepreneurs. However, the effects of restructuring in nurses’ work are actually minor as can be estimated for example in the results from the survey conducted by Partanen, Heikkinen and Vehviläinen-Julkunen (2005) about the working conditions of Finnish nurses. Of the respondents (n=1186), 90 percent worked in the public sector (88 percent in municipalities, 2 percent for the state) and 9 percent for private companies or foundations. Only 0,5 percent of the respondents were independent entrepreneurs.

Nurse education
Nurse education is regulated by the Ministry of Education. In working life, nurses’ degrees passed either in the educational institutions of health care (or earlier in educational institutions of nursing) or in the polytechnics are demanded to be able to work in the position of a nurse.

Nurses in education and nurse education have lately been researched quite thoroughly, and the research interests can be linked to changing the education of nurses to polytechnics. The research interest in Jaroma’s (2000) dissertation in health sciences is the education of nurses and the future functions of student nurses in nursing. Using a survey aimed for midwifery, nursing and public health nursing students (n=1705) Jaroma examined the students’ views concerning professional education and their future profession in nursing. Among the issues dealt with in the study are questions dealing with professional development during studies and the substance of teaching derived from professional qualifications. Most students reported making great or moderate progress in methodical and comprehensive professional function, but less in social participation in health issues. Almost all students regarded themselves as primary nurses (who treat the patient as an individual), and characteristics of primary nursing were highlighted in students’ views on their future work. Jaroma concludes that nurse education in polytechnics has been developed in the direction of professional qualifications and educational and health policies.
Räisänen (2002) published her dissertation in 2002. She compares the command of nursing function between nurses who graduated from the educational institutions of health care and those who graduated from polytechnics into care professions (nurses, public health nurses and midwives). Räisänen collected her first data in 1992 from nurses graduating from educational institutions of Health Care (n=531) before the polytechnic reform, and the second data in 1999 from nurses graduating from polytechnics (n=328). The data also consist of a survey targeted for nurse educators (n=94 in 1992 and n=34 in 1999). The functions of nursing were hierarchically classified into main categories, and the profundity of the functions of nursing was estimated using an instrument with six levels ranging from novice to expert (Benner 1984). The students’ command of nursing functions was found to be fairly good (estimated by both students and teachers). Among the functions they had best command of were confronting feelings, mental support, basic care, and creating a safe and caring environment. Among the functions they mastered the worst were functions related to rehabilitation and to dying. Graduates of polytechnics were found to have less command of nearly all the functions than graduates from earlier educational institutions of health care.

In her dissertation, Salmela (2004) returns to the question of nursing skills gained in nurse education. She evaluated the nursing skills of nurse students and the teaching of these skills at polytechnics by using students’, teachers’ and mentors’ ratings. The data was collected in two phases by questionnaire. In 1996 the data was collected from nurse students completing their final term at educational institutions of health care and at polytechnics. The study results of the students studying at polytechnics turned out to be poorer than those of the students studying in colleges. A comparison data was collected in 2002 from nurse teachers (n=164) and nurses who supervise the practical training of nurse students on medical, surgical and oncology wards in five hospitals (n=268). The nurse students’ skills were classified into three levels according to their specificity: nursing that promotes the physical/psycho-emotional health, nursing that corrects the physical/psycho-emotional health and disease-specific physical/psycho-emotional nursing. All parties estimated the skills of students as moderate, the mentors being most critical in their ratings. Nurse educators took the most positive standpoint regarding the physical nursing skills of students. All parties were of the opinion that the students’ skills were most satisfactory in nursing that promotes health.

Content of work and work conditions
The restructuring of the welfare state has changed the work life balance for many professionals in the public sector. The changes in the labour market have led to a situation where especially young female professionals are faced with temporary and short-term employment. In 2000, 30 per cent of nurses who worked in health care did not have a permanent position (Santamäki 2004). Santamäki (2004) approaches the changes in nurses’ employment and relates the rise in unemployment in the 1990’s to the larger change in the labour market due to the end of welfare state expansion.

In an early study about nurses’ job satisfaction, Harjuniemi (1970) showed that shift work is the major issue when nurses (n=740) define their work conditions...
to be poorer than in most other occupations. In this study in 1970, all in all 59 percent of nurses liked their work, 30 percent liked some areas of their work and disliked some other areas, and only one percent of respondents did not like the nurse’s work. Half of the respondents (51 percent) stated that their workload is too extensive. Only 13 percent evaluated her/his work as one-sided. 80 percent of the nurses estimated that their working conditions were poorer than those of an elementary school teacher, and when nurses were asked to evaluate their social prestige, they estimated to be as highly respected as elementary school teachers. 11 percent of nurses thought that according to their salary, nurses belong to a lower social stratum than their education would presume.

In the 1980’s, Kivinen et al. (1985) analysed the work of nurses, specialised nurses and auxiliary nurses (n=1331). They state that the expansion of the hospital network and the technologisation of care have changed nurses’ work so the amount of managerial and administrative work has increased and more expertise on technical issues is demanded. The nurse’s role has moved gradually from direct care of and interaction with the patient (“the caring mother”) to technical expertise and knowledge on specialised medical areas (“care technician”). Much of the primary care of the patient had been moved to auxiliary nurses. In this study conducted in the middle of the 1980’s, nurses (n=793) estimated their work to be rather demanding and hasty, and the work duties rather limited. Care was seen as physically demanding, and even while being busy nurses were expected to be exact and careful in performing their tasks. The possibilities to influence the content of work were limited. Shift work was mentioned to be one of the central strain factors in nurse’s work. However, most nurses (82-86%) were satisfied with their work.

Almost 20 years after the abovementioned study by Kivinen et al. (1985), Kuokkanen (2003) found in her study on nurse empowerment that nurses are able to control themselves and their environment quite well. Nurses report of having ethical sensitivity and being skilful in practical care. Clearly more than half of nurses reported being satisfied with their work. Despite this, half of the respondents had thought about changing their job and one third had thought about leaving nursing. The nurses work independently in the actual work with patients, but they estimate their possibilities to influence the aspects of their work as minor.

Pelttari (1997) conducted research on the present and future qualification requirements in nurses’ work. The research was published at the early stage of nurse education in polytechnics and the objective was to produce scientific knowledge on requirements for education and planning. Qualification requirements are defined as requirements that are derived from nurses’ work and that are set for nurses’ professional skills. Pelttari defines nurses’ work and their profession, and clarifies the influences that social changes have on social and health care, nursing and the professional demands set for nurses. The results show that the required qualifications for a nurse are “human to human” requirements: interaction skills, empathy, friendliness, responsibility, caring, holistic ability to meet and help people with various problems and the ability to act as the patient’s/client’s advocate. Additionally, a nurse needs multicultural abilities and health promoting skills, constant self-up-dating and readiness to
develop oneself as well as ability to cope with change. According to Pelttari, more emphasis in the future will be based on multi-professional communication skills, research and knowledge-searching abilities, managing skills and skills supporting patient’s/client’s self-care.

Santamäki (2004) focuses in her study on nurses’ position in the labour market. Nurses are the largest occupational group in Health Care as nurses form one quarter of all the personnel working in Health Care. The 1990’s was exceptional time for nurses. Increase in education and the end of welfare state expansion created a reservoir of labour that seems to find positions in the working life only in the beginning of the millennium. In the 1990’s, the occupational positions of nurses were segmented: unemployment and temporary work were the fate of nurses who had graduated in the 1990’s or of those who were returning to working life at that time. Nurses who were in permanent positions in the early 1990’s kept their positions, and the changes in working life could be seen in their work as tightening of the work pace.

Partanen, Heikkinen and Vehviläinen-Julkunen (2005) conducted research on the work and working conditions of nurses practicing nursing. The research was targeted at members of the Finnish Association of Nurses (N=18700). The survey sample was 3000, and the response rate was 40 percent. The respondents represent the members of the Finnish Association of Nurses in terms of age, sex, occupation and geographical area. The average age of the respondents was 42, they had an average of 14 years of experience, and their last educational degree was taken in the 1990’s or 2000’s. The great majority, 88 percent of respondents worked in the municipal sector, 73 percent in shift work and 62 percent on the wards. On wards, nurses had responsibility over 14 patients on average. In general, nurses estimated that there is shortage of staff on the shifts (76%). Nurses’ work includes areas where nurse education would not be needed (like secretarial work or work related to food-service and cleaning). Nurses estimated that in their work there is not enough time for patient guidance, supportive discussions, hygiene, rehabilitation or updating the nursing plan. In spite of that, nursing in the respondents own unit was evaluated to be of high quality (85%). Experiencing work-related stress (a lot or to some extent) is common among nurses (75%) and it is common that the work is piling up (74%).

There is not much research available on the changes and effects that technologisation 
and the use of ICT have brought into nurses’ work. However, since 1998, Finnish Social and Health Informatics Association FinnSHIA (Sosiaali- ja terveydenhuollon tietojenkäsittely-yhdistys ry, STTY) has arranged a yearly conference to discuss issues related to research on ICT use in social and health care. According to Saranto (2001), the development of information technology is changing the process of health service provision, and the relationship between the customer/patient and staff in health care. It cannot be assumed, however, that personal face-to-face interaction between e.g. the nurse and the patient could be replaced. Information technology has created new

7 Technologisation of the society or technologisation of working life refer to work practices where tasks are increasingly accomplished using new technology, technical processes, methods and knowledge.
aspects to work and is used in consultation, transfer of information, rationalisation of nursing, and in taking nursing to the patient’s home.

Technologisation of nursing can be estimated by the results of Partanen et al. (2005). Two thirds of nurses that responded the survey reported to be using appliances that measure the vital functions of the patient. Similarly, 60 percent of the respondents used appliances related to patients’ medication weekly or more often. Nurses estimated that they had enough technological appliances (60%) for the care of patients, and that technology was mainly new and secure (67%). Nurses use computers in their work daily (95%). Nurses are not afraid to use technical equipment (90%) in their work, and similarly, they expressed that it is not difficult to use the appliances (83%).

**Professional position and professional knowledge**

In the introductory text for the edited volume of *Hyvinvointityön ammatit* (Occupations of welfare work) Henriksson and Wrede (2004) evaluate the research on different occupations that exist in the wide area of care. They state that the welfare state in Finland has created a special environment for the development of occupations in the area of social and Health Care. Occupations can be understood as societal agreements about the content of work and the division of labour. From the point of view of welfare work, the welfare policy can be seen to have been significant for all the occupations that aim to promote the goals of welfare. Occupational groups are understood as interest groups that aim to control their own benefits in the formation of the occupation.

Henriksson (1998) focuses in her research on the occupational development of health work and women’s action and interests as the basic elements of the Finnish welfare state. Using texts like state committee reports, articles in professional journals, histories of health occupations, text books, memoirs and biographies she analyses significant events of the professionalisation process of health work in Finland. Core issues in the occupational struggles within health work are skill, education and definitions of vocations and hierarchies. Henriksson pays special attention to women-friendly strategies in professionalisation tendencies. In the professionalisation of health work, the differences between occupations have been stronger than for example in teaching or in social work. Health care work includes different kinds of occupations that are based on education provided on different levels, which has given women coming from different social strata opportunities to position in health work. Nurses are seen as one occupation in the complex hierarchy of health work and among the heterogeneous group of (female) health care experts.

Eronen and Mäkitörmä (1987) published their study about nurse’s occupation and education (*Sairaanhoitajan ammatti ja koulutus*) in the 1980’s. The study was part of a larger study on professional occupations, in which nurses were seen to be in a semi-professional position. The authors analysed the generalised

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8 In various texts, especially in the early 1990’s the Finnish welfare state was seen as an ally of women (e.g. Julkunen 1990). The welfare state provided care for the elderly and young children and thus created possibilities for women to work outside home. The welfare state offered women large opportunities to do the caring work as paid labour.
view of the occupation of a nurse from the point of view of various actors and interest groups in the field. Nurse educators \( n=65 \), nurses \( n=105, n=123 \) and student nurses \( n=133 \) were asked about the ideal nurse. The ideal view of a nurse from the point of view of nursing schools (nurse educators) emphasises scientific base, artistry, societal orientation and striving towards a more independent role for nurses. The nurses themselves emphasised traditional duties of a nurse, and practical issues of nurses’ work and left the scientific base of nursing to the background. The ideals of the school and practice differ to some extent. Nurse students go through a socialisation process while in nurse education. At first, their view of nursing remains the ideal of the school, but during the education the view of an ideal nurse moves closer to the practical view in the field.

In her study on the social order of the hospital, Moore (1995) sees nurses to be clearly in a semi-professional position in their work. She observed doctor’s rounds on surgical wards paying attention to the interaction between the three major actors that form the interaction situations on ward rounds: the doctor, the nurse and the patient. The interaction is hierarchical and based on the order defined by the profession of medicine. Nurses and patients plan and time the morning doings on the ward in such a way that everything is ready when the doctors arrive for the rounds. Patients position themselves in beds, and nurses prepare the situations for doctors by opening the dressings on wounds and forwarding and opening the patient files for doctors. In the interaction, nurses take a subordinate and unsociable role. In situations where the patient is not able to talk or the patient is breaking the social order by not being present in her/his bed at the time of the ward round, the nurses act as the patient’s advocate and transfer the information about the patient’s condition and symptoms to the doctor. At the time of this study, the philosophy of primary nursing was becoming stronger in nurse education and on the wards. This had strengthened the position of the nurses in relation to auxiliary nurses and assistants, but the profession of medicine was dominating the interaction situations on ward rounds.

Hildén (1999) analysed the competence of nurses and related influencing factors. She approached the competence from the point of view of restructuring: the changes in the health care in the 1990’s had influenced nurses’ work and professional competence. In nurse’s work a narrow, experience-based and adaptive competence is not sufficient, as it would lead to value stability and resist change. According to Hildén a nurse needs extensive, analytic and innovative competence, which enables adaptation to changing situations and development in the changing work. The results of the survey \( n=429 \) showed that work communities expect nurses to use the versatile caring methods of nursing and to have strong knowledge from their own special field and abilities to apply this knowledge into practice. In addition, nurses are expected to have good ability to cope with change and to have good skills in decision-making, planning, development and evaluation. Even if nurses give high value to their profession and their work, they think that work communities expect them to have even better competence than they have now.

Meretoja (2003) developed a tool called Nurse Competence Scale (NCS) with which to assess the level of nurse competence in different hospital work.
environments. She points to the fact that there are very few studies about nurses’ perception of competence. Her results showed that both nurses (n=513) and nurse managers (n=81) regarded the level of nurse competence as good. Both groups gave high ratings for managing situations, helping role and diagnostic function competences. The lowest level of competence was identified in the competence of ensuring quality.

Eriksson-Piela (2003) studied how nurses and auxiliary nurses construct their professional position in the hospital hierarchy. She examines interview data using rhetorical discourse analysis and places her focus on power relations. She explores professional knowledge, professional responsibilities and moral standards, professional relations with patients and within the work community. Her results show that the professional identity of nurses is constructed in the hierarchy of the hospital. For Eriksson-Piela, professional knowledge is a reflection of the new expertise that is based on scientific knowledge and customer-based practises.

Paloposki et al. (2004) analysed higher educated nurses’ professional competence of theory and practice. Professional competence was identified as knowledge and skills by which the nurse is doing her/his work. Professional competence is an integrated totality of theory and practical skills that is implemented as fluent practices and ability to solve the problems arising in actual work situations. Paloposki et al. carried out a survey to a target group of 1000 higher educated nurses; the response rate was 47 percent. Nurses’ professional competence was divided into theoretical knowing, practical skills, guidance, teaching and interaction skills, ability to develop, critical and reflective knowledge, teamwork and management skills, and ethical, legal and societal knowledge. On average the nurses evaluated their professional competence as good. Theoretical knowing was seen to be weaker than practical skills and competence. The length of nurses’ work experience was the most important factor connected to professional competence, and thus the study supports the idea of growth to professional expertise by steps after education in working life\(^9\).

\(^9\) e.g. Benner 1984.
Research on teachers and teaching in comprehensive schools in Finland

The age of second republic can be divided to the following periods (Alasuutari 1996):
1) Phase of moral economy (from 1945 until 1960’s),
2) phase of planning economy (1970’s), and
3) phase of competition economy (1980’s).
The period from the early 1990’s has been time of economic recession, recovering and restructuring processes.

History
The education of teachers has been organised and controlled by the state. Elementary school teachers and comprehensive school teachers have been, and still are, mainly working in municipal institutions as the responsibility of arranging compulsory education for all children rests on municipalities. Rinne & Jauhiainen (1988) introduce in their extensive analysis of professions within the public sector also the occupation of the teacher. Konttinen (1991) limits his analysis of professions in the area of education to earlier grammar school teachers. A history of teacher education is presented by Nurmi (1979). There are plenty of histories of schooling and schools: e.g. Nurmi (1989) has produced a thorough history of schooling on the elementary level and Kiiasmaa (1982) a history of grammar schools.

The Law of Compulsory Education came into force in 1921. From the Second World War onwards the educational system expanded rapidly. Up to the 1970’s, the education of children was differentiated after four years in the elementary school to grammar school and secondary modern school. The teaching profession was also differentiated into grammar school teachers and elementary school teachers (Nurmi 1979). The education of teachers took place in teachers’ colleges (seminaries). After the war there was a lack of qualified teachers, and thus, possibilities for unqualified teachers to be appointed as teachers were created for the education of the large generations that were born after the war (Rinne & Jauhiainen 1988; Nurmi 1979). The comprehensive school reform that started at the beginning of the 1970’s changed the earlier division of children to secondary modern schools or grammar schools as all children were to participate in the comprehensive school for nine years. At the same time, the positions of teachers changed. The former grammar school teachers were to form the new category of subject teachers in comprehensive and upper secondary schools and former elementary school teachers were to form the class teachers’ profession. The education of teachers was moving from the earlier seminars and temporary colleges of teacher education (high schools) to university level education (Rinne & Jauhiainen 1988; Nurmi 1979).

The administration and planning of welfare service provision was centralised, which included a unified and detailed curriculum for comprehensive schools from the 1970’s to the 1990’s. Stress was placed on the issue of equity and equal opportunities. In the 1980’s, teacher education was established in universities and today comprehensive school teachers gain the base of their professional knowledge in universities. They all graduate with a Master’s
degree in education (e.g. Eurydice database 2004). Specialisation of teaching in comprehensive schools has continued: Education of subject teachers, class teachers, special need teachers and student counsellors has expanded and school assistants are being employed to help teachers in classroom situations.\(^\text{10}\)

In the 1990’s, The National Board of Education prepared the general ground of the curriculum, and the municipalities or the schools were to prepare their own curriculum based on these general guidelines. This was part of the general tendency to bring more decision authority to the local level combined with the obligation to evaluate the services provided. However, there is now a trend back to state control in curriculum as Finnish National Board of Education prepared the new core curriculum for comprehensive schools that has to be used in all grades of comprehensive school starting at the latest on the 1\textsuperscript{st} of August 2006. (National Board of Education 2005.)

In Finland, people are drawn to densely populated areas. The migration has led to new challenges in arranging compulsory education. In big cities, arranging comprehensive education for larger amounts of pupils within the area of living is a demanding challenge for municipalities. On the other hand, arranging education in sparsely populated areas with a few pupils is a special problem of rural areas. The number of schools has decreased due to migration, changes in the age structure of the population and tightening economy of municipalities. The number of school children has decreased in rural areas and increased in areas of growth.\(^\text{11}\) In addition, teachers face new challenges and demands in their professional work due to multiculturalism and widening use of technology.

In the context of shrinking age groups and tightening economy, the regulations concerning grouping of students have been abolished and the number of schools has decreased dramatically. Since 1990, over 1300 comprehensive schools have been closed down. It seems that instead of municipality, county is becoming the basic administrative unit of schools.

**Teacher education**

The research on teachers and teaching is very wide in Finland. There is a large research body of becoming a teacher as in many studies the focus has been on student teachers. Becoming a teacher is often described as development and growth. Studies about teacher education cover all the levels of the educational system: kinder-garden teachers, teachers in the comprehensive school and the upper secondary schools (class teachers, subject teachers, special need teachers, student counsellors), teachers in vocational schools, polytechnics and universities. In this research review, we concentrate on research concerning teaching and teachers in comprehensive schools.

\(^{10}\) In spring term 2002, altogether 45 568 teachers worked in comprehensive schools including principals and substitute teachers. 85 percent of teachers had the formal qualification for their work as a teacher. (Ministry of Education 2003, 20.)

\(^{11}\) The number of comprehensive schools was 4130 in 1995 and 3578 in 2002 (Ministry of Education 2004).
In 1992-93, Laine (1993) carried out a research that dealt with students’ conceptions of education and their change during nursery school (n=30) and class teacher training (n=30). Students’ reflections on the change of their conceptions were also taken into account. Phenomenographical approach was used in the research. As a result it was found out that at the beginning of their studies students’ conceptions were quite hazy. However, the development of class teacher students was more intensive during the first years of their training than during the later years. While the conceptions of education were most developed at the end of the training, many students had still quite diffuse conceptions at the end. Students’ reflections on their conceptual development seemed to associate with their conceptual development. They reflected that their conceptual change had taken place on the very areas where the change was actually measured. At the beginning education was seen as transmitting and representing information. As the conceptions developed the emphasis was placed on target-oriented conception of teaching practice. Only few considered understanding and realization explicitly as objectives of teaching.

Väisänen (1993) investigated student teachers’ study orientations through a survey (n=356, of whom 79 were re-tested later) in 1990-91. The orientations were discovered by factor analysis through analysing students’ approaches to learning, their learning styles, motivation and learning processes, and how these study orientations correlate with the perception of the learning context, the styles of student-teaching and the educational beliefs. The correlations of the study orientations with the students’ earlier school attainment, stage of the studies and other such background variables were also investigated. The study orientations discerned were labelled Meaning Orientation, Orientation toward Achievement and Reproduction, Non-Academic Orientation and Vocational Orientation. Influences of the learning environment, learning attitudes and styles, and students’ educational beliefs correlated with the study orientations in certain ways. The perception of department’s learning environment as positive and providing “good, vocationally relevant teaching” correlated positively with both Meaning Orientation and the Orientation towards Achievement and Reproduction, while the perception of environment as constraining and indefinite correlated with Non-Academic Orientation with learning pathologies and disorganised habits of acquiring knowledge. Self-directed learning and reflective attitudes in teaching correlated strongly with Meaning Orientation, whereas model-depended study orientation correlated with either Vocational or Achievement and Reproduction Orientation. The dimension of “reflective practitioners” emphasizing the idea of professional growth correlated with the Meaning Orientation.

Silkelä & Väisänen (1997) studied the views of students who started their class teacher studies in 1992, concerning learning. Data of the research was collected between 1992-1996 by six rounds of thematic interviews. Data was analysed phenomenographically in order to find views of learning of qualitatively different levels. The views concerning learning were diverse and polymorphous, and they reflected students’ contexts of experiences and were based on their personal, spontaneous learning styles and strategies. At the beginning of their studies, students’ views corresponded with the definitions of learning stated in textbooks. As they proceeded in their studies views were more based on experiences of studying and life. Learning was seen as an active process that is
connected to everything. However, this change did not take place with the views of some of the students.

Kiviniemi (1997) examined adult students’ experiences and views of teaching practice and its supervision. He analysed using Erving Goffman’s frame analytic approach different interpretative frames that are associated with teaching practice from the perspective of student teachers. The study was carried out with students who started their studies in a special program in class teacher education in 1991. The data was collected by observing and interviewing student teachers, and by using open-ended questionnaires and reflective diaries kept by them throughout the program. Teaching practice was experienced mostly as positive. It was seen to give self-confidence for teacher’s work and develop students’ teacher identity. On the other hand, if the practice situation was not seen autonomous enough, it was not experienced as meaningful. According to Kiviniemi this supports the view that students’ own practical theories about the nature of teaching and learning should be considered as the starting point of supervision interaction. Four different interpretative frames were conceptualised. In the frame of teacherhood and teaching, children’s learning was of central importance. The frame of practicing teacherhood emphasized the utilization of the practice situation to develop one’s own views of teaching. In the frame of representation, the orientation was to give as good a teaching presentation as possible. The aim of satisfying the supervisors’ wishes was placed before one’s own view of teaching in the frame of theatrical fabrication. Kiviniemi states that students’ interpretations of the nature of teaching practice sometimes distort the nature of practice experiences and the supervision dialogue.

Sunnari (1997) studied gendered structures and processes in primary teacher education. Her study included historical and contemporary parts. The focus of the historical study was the gendered structures of the first Finnish Teacher Seminary and the structures of three annual curricula of primary teacher education in University of Oulu. Contemporary analysis of the gender system was based on data collected during a pedagogic development project carried out at the Oulu Department of Teacher Education in the years 1988-1996. According to the findings, the academic curricula proved to be ostensibly gender-neutral. Sunnari argues that formal neutrality does not eliminate institutionalised gendered features for personal and/or professional development. For example in contemporary primary teacher education in Oulu the students qualifying in the first two forms were female. Male students tended to acquire their qualifications according to their personal orientation whereas female students qualified in various subjects taught in primary school. Pupils were experienced and their school achievements interpreted in gender-related ways: for example, boys were experienced as more challenging than girls by both female and male students. This tendency was also shared among pupils.

Silkelä (1999) studied personally significant learning experiences of students who started their studies in a class teacher programme in 1992. The aim of the study was to find out what are the personally significant learning experiences, and what is their meaning, by interviewing students and analysing the interviews through phenomenological and hermeneutical methods. Students picked out themselves altogether 190 significant learning experiences with 164 positive and
26 negative ones. For example learning to read before starting the schoolwork, learning languages in the upper level of the comprehensive school, substituting a teacher after high school, starting the studies at the university, student-teaching, changes in one’s learning style and experiences in small groups were considered as significant learning experiences. Such learning experiences were analysed and interpreted in the context of students’ life courses. As a result Silkelä found a variety of symbolic experiences of growth, transitions in life-course and meaning of life. Significant persons, the experimental nature, social character, dialogue of the learning situations and their emotional contents were considered important factors of learning experiences.

Laine (2004) studied students’ (n=64) professional development in teacher education. Her research dealt with the construction of professional identity during classroom teacher education. She used students’ essays and portfolios, which were produced as a part of their educational studies, as research material with interviews of twelve students in different phases of their studies. The approach of the research was hermeneutical and phenomenological aiming to understand professional development. The grounded theory approach was also used. As a result Laine classified students into five classes according to their view of good teaching and ideal teacher: 1) didactic experts, 2) affectively child centred, 3) task and goal oriented, 4) climate centred and 5) emancipatory oriented teachers. The personality of the teacher was considered as a crucial factor of teacherhood. Professional identity was seen as constructed in a dialogue between inner and outer reality, and as the inner feeling of one’s knowing, value and significance. The dimensions of classroom teachers’ professional identities were 1) the experience of oneself and one’s skills, 2) the task and the area of operation, 3) roles and ways of working, 4) the position of power, 5) responsibility, 6) appreciation of the profession, 7) professional history and 8) the picture of profession in the future. Laine found that the teacher types were permanent during the whole teacher education period. However, teacher education was able to broaden the students’ views in some areas.

How student teachers experience their final practice was studied by Rajala (1992; 2001a; 2001b) on two occasions in year 1990 and 2000. A two wave panel design was used in order to trace changes during final practice. As far as emotions were concerned, there was clear decade effect, namely, student teachers had more negative emotions in year 1990 than in year 2000. The opposite was true for positive emotions. In terms of cognitive appraisals, the final practice was judged as providing more opportunities for learning in the year 2000. Student teachers also invoked more problem-solving and social support in the year 2000. Problems encountered in final practice increased in 1990 and the opposite trend was true for 2000. The changes can be interpreted to be due to the fact that the assessment for teaching skills was abolished in the beginning of 1990’s. Also, the model of teacher training changed during the decade and student teaching was based more on a reflection model.

In the context of technologisation of teacher’s work and teacher education, Luomalahti (2005) studied female students’ technological orientation in the multi-didactic studies of technology in class teacher education. His empirical
analysis was based on concepts of technology, image of technology, attitude towards technology, source of motivation to study technology and self-image in technological education. As a result Luomalahti found that the female students’ general image of technology reflects their subjective values, priorities, expectations and attitudes. Technology was quite generally perceived as belonging to the men’s territory. Common stereotypes associated with technology were apparent. Professional growth and technological know-how, as a way to strengthen one’s competence in the future career as a teacher, were perceived as important sources of motivation to attend technological studies. Studies were perceived as meaningful and challenging because they involved doing something concrete. Social and emphatic skills considered as characteristic of women, as well as skills requiring creativity and dexterity were assessed as strong skills by female students themselves. Also certain technical skills such as teamwork, practical mathematics and use of domestic appliances were assessed as strong skills.

Content of work
In education more decisional authority has been brought to the institutional level and individual teachers have been combined with the obligation to evaluate the education provided. Niemi (1998, 8) has stated in her analyses about the changes in teacher’s work that (1) teachers face the changes as higher demands to give their pupils “building material” for future, (2) pupils in schools should also learn to learn actively and to learn to use new media and information technology, (3) continuous changes make the teacher a learner as well. Kohonen and Kaikkonen (1998) follow the same line. They state that teaching is becoming more demanding due to structural changes in the society. The changes that are reflected in teacher’s work include for example increase in inequality, change and uncertainty in families and working life, internationalisation and the restructuring of the welfare state benefits. The authors state that the traditional view of a teacher working alone in the classroom is strong, but now teachers are supposed to become pupil-centred and working community-centred (ibid).

According to Jakku-Sihvonen (1998) the effects of restructuring changes to teaching are: (1) curriculum work, the renewal of the curriculum force teachers to participate in creating the school’s own curriculum based on general guidelines; (2) information up-date work, cut-backs in funding lead to recycling of the old books and teachers need to update the information continuously on their own; (3) evaluation work, expansion and duty of evaluation of schools and teaching place pressure on teachers who need continuous professional education to fulfil their new tasks. Webb et al. (2004) report of a study concerning the impact of educational reform on teachers’ work. Teachers tell about greater burdens of workload as goal-steering and management by results are more time-consuming and demanding than work before. More work outside the classrooms like preparation time with other teachers and time in whole school activities is now required of teachers. (Webb at a. 2004, 330.) Simola, Rinne and Kivirauma (2001, 90) state that the professional profile of the teacher has changed from teaching and mediating information to all-inclusive taking care of the pupil.

Regarding to the technologisation of teachers’ work Kotilainen (2002) examined the role of media education in Finnish teacher education. Media education was
introduced as part of the interdisciplinary subject of communicational education to the comprehensive schools in Finland in the 1990’s. Kotilainen’s research includes two different empirical studies that view the issue from different points of view, with different research methods. The first one is a qualitative evaluation of the effectiveness of visual communicational education course; the other is a statistical one (n=896, with 65.5 percent response rate) describing the teachers’ attitudes and implementation of the subject in comprehensive school. As a result Kotilainen found out that education, the life history of the learner and factors from the educational system are the constituents of the effectiveness of media education. The constituents of the teacher’s media competence are her/his commitment to promote pupils’ growth in media education, mastery of teaching methods promoting active learning, positive orientation towards co-operation and communication in action and critical autonomy as a media teacher. The most effective were the teaching methods promoting active learning. Problems arose from difficulties concerning integration of media education into the school subjects and pedagogical co-operation.

Talib (1999) has handled in her dissertation the issues of otherness, intercultural education, learning and confrontations in the school. The research was a theoretical one including an empirical part investigating teachers’ basic beliefs: values and attitudes towards pupils and especially towards immigrant pupils. The research was carried out with 121 teachers in comprehensive schools in Helsinki. Talib examined the factors that have an influence on immigrant pupils’ school performance. She asks why some of the schools produce successful immigrant pupils whereas others do not. According to Talib, teachers’ perception of pupils and her/his beliefs concerning them do have influence on pupils’ school performances. Results showed that teachers experience immigrant pupils as challenging and enriching but also as somewhat straining. It was also discovered that the more the teacher had experiences on pupils from other cultures the less s/he experienced teaching them as enriching. Half of the teachers considered themselves as multi-culturally oriented. However only about 10 percent of teachers did commit themselves to socially reproductive multicultural principles of education emphasising acceptance of dissimilarity, social democracy and social reproduction. Talib sees lack of resources and time as well as teachers’ ever growing workload to be reasons for teachers’ frustration. This frustration leads to difficulties in confrontation with pupils from other cultures.

In the survey research (n=913) conducted by Miettinen and Pitkänen (1999) it was found out that even though teachers come out for multiculturalism in principle, there are quite a few points of view in teachers’ answers that promote multiculturalism in teaching practice. Teachers did not view their work with immigrant pupils from the pupils’ perspective, rather their answers considered the problems concerning teachers’ own work instead. Lind (1998) found out that teachers are very often lacking information about immigrant pupils’ previous school background. This was considered crucial especially concerning pupil’s mother tongue. A teacher was not always aware of whether the pupil had had any language training at all.

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Students in class teacher education program assessed themselves as lacking professional competence in teaching pupils from other cultures in the research of Matinheikki-Kokko (1999). Students stated the need for knowledge and skills for confrontation with a multicultural group and with an individual from another culture. Also in Talib’s (1999) research teachers (n=121) considered that basic class teacher education did not provide them with skills acquired in confrontation with immigrant pupils. However, supplementary education was seen as an aid to fill this gap.

**Teacher’s profession and professional knowledge**

Niemi (1995) analyses young teachers’ *professional development*. She uses the model of professional development that includes professional skills, personality and cognitive processes. She collected her data in interviews from teachers who had finished a university level degree in education in the late 1980’s and who had been working as a teacher for 1-3 years (n=129). Most of the teachers felt that they had acquired good abilities for the didactic tasks of a teacher. They also had good ability to plan and evaluate their work. However, abilities to master situations involving interaction, cooperation with parents, pupil welfare or extracurricular tasks were considered poor. (Niemi 1995.) Niemi (1996) defines teaching in the frame of *new professionalism*: teachers have an independent and autonomic position, and their active learning continues after education in work. Interaction and communication skills are essential.

The issue of teaching as a profession is still topical. In 2000, a collection of 9 articles was published under the title *About teacher’s profession* (Opettajan professiosta, Harra 2000). The articles approach the quality and change of the profession focusing for example on the nature of teaching, expertise, development and renewal and growth.

In the 1990’s especially two concepts related to teacher’s profession were repeated in the studies. *Teacher-researcher* (Tutkiva opettaja) or more precisely “a teacher who conducts research” appeared into discussion of teacher’s profession in the 1990’s (Ojanen 1993; 1996). ‘*Teacherhood*’ (opettajuus) is a popular concept in educational research and debate in Finland; the concept refers to teachers’ professional identity and professionalism as a source of this identity (Kauppila *et al.* 2005).

In 1993, the first collection of articles under the title *Teacher-researcher* (Ojanen 1993) included 14 articles. The articles see research in teacher’s work either as traditional academic research or action research on every day practices of teaching. In 1996, the second collection (Ojanen 1996) was published with 16 articles approaching the issue of research in teaching. The articles deal with teacher education, professional growth and development, biographies and reflection.

*Teacherhood* was a common way to approach teaching as a profession in the 1990’s. The edited volume *Resources of teacherhood* (Opettajuuden eväät, Tähtinen 1994) includes no less than 35 articles collecting in one volume the

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12 Luukkainen (2004) translates the concept as ‘teachership’.
wide research subjects within education. The book reflects the variety of class
teacher education and provides the reader to the expected changes in
teacherhood: learning and pupils are emphasised instead of teaching, new
teaching methods are developed and teachers need knowledge about
multiculturalism. *Teacher as a learner* (Opettaja oppimassa) edited by Anttila *et al.* (2001) also deals with the various aspects of teacherhood, teaching and
learning. *Constructing teacherhood* (Opettajuutta rakentamassa) edited by
Heikkinen *et al.* (1999) continues the series of edited volumes on teacherhood.
This volume concentrates mainly on teacher education and becoming a teacher.

Heikkinen and Syrjälä (2002) have published a rich collection of teachers’
stories on their work and life. Their aim is to hear teachers’ voices, to analyse
the reflections of social and educational change in the stories and to apply
narrative approach in teacher education.

Yrjönsuuri & Yrjönsuuri (1995) studied the professional knowledge of
classteachers (n=286). In their survey they used different measures to achieve
knowledge on teachers’ knowledge and skills. The responses are carefully
analysed using various quantitative methods. They found seven dimensions in
teachers’ know-how: knowledge of the subject, knowledge of teaching, knowledge of context, didactic skills, evaluation skills, methodological skills and interaction skills. These dimensions are not separate areas of knowledge.
Instead, they are dimensions that are combined and needed in teachers’ work situations. Yrjönsuuri & Yrjönsuuri also found eight different situation orientations: orientation to teacher’s work, teacher’s know-how, pupils’ learning, teacher cooperation, dependency on instructions and school books, dependency on teacher’s role, fear of failure and renouncement. The tasks of the teacher
would be performed the better the stronger the teacher is oriented to his/her task. Furthermore, Yrjönsuuri & Yrjönsuuri define dimensions to consciousness of reflection: conscious reflection in action, conscious reflection outside action, unconscious reflection while trusting in oneself and unconscious reflection while trusting in teacher’s role.

Simola’s (1995) study on Finnish teachers published under the title *The Guards of Plenty. The Finnish schoolteacher in educational state discourse from the 1860s to the 1990’s* (the text in Finnish) presents the model teacher that was constructed in the national curriculum and committee texts since the
establishment of the elementary school system in Finland. In the results, Simola
presents three thematic vein matrixes to describe the changes and continuities in
speaking about school, teacher training and teacher. He reduces the changes to
four processes in educational state discourse in the 20th century:
individualisation, goal rationalisation, decontextualisation and disciplination.
The modern discourse of teaching that developed through these processes is characterised as *rationalism of hopes*. The main results show that the discourse on teaching is reconstructed in four “truths”: the truth of the *individual-centredness of teacher’s work*, the truth of *goal consciousness* as the main professional quality of a teacher, the truth of *scientific didactic knowledge* base for teacher’s work and the truth of *comprehensive pupil examination*. Simola states that these truths are crystallised in a certain pastoral professionalisation
rather than in general professionalisation of the state discourse on teacherhood. This is due to the institutional, knowledge and client relations of teacherhood.

Luukkainen (2004) has used the methods of future studies in his research on teachership. He claims that the changes in the decision-making process from earlier centralised planning and steering to guidance through evaluation and monitoring emphasise the opportunities for educational institutions and individual teachers to steer their work. This way teachers have a great deal of influence both in their work and through their work. Luukkainen constructed a concept of teachership for the year 2010. His study is not limited to teachership at any specific level of education, instead, it focuses on teachership in general terms. The qualitative study includes both ethnographic and phenomenographic elements and its key elements are based on Delphi method. Quantitative material of the teaching and educational needs are analysed, too. The results show that teachers are finding their control over their work threatened. Conclusions present a conception of future teachership, where the teacher has ethical opinions and plays an active role in developing society. The constituencies of teachership are content management, promotion of learning, ethical objectives, future orientation, societal orientation, co-operation and continuous self-development and work development.

Conclusion

Research on restructuring of the welfare state provides an account of changes that have taken place in arranging education and health care. The estimations of the impact of restructuring on the professions of nurses and teachers are somewhat vague. In the area of education, accounts of the change in educational policies have been published (e.g. Rinne 2000), but empirical findings about the changes towards e.g. diversification and stratification of the school system, differentiated curricula, stronger parental choice, private competition or private funding are missing. In the area of health care, research on restructuring includes very few referrals to the changes in nurse’s work and profession. In the Finnish language, ‘profession’ (professio) is a new word, and it has a different meaning than occupation (ammatti). ‘Profession’ is used in research, planning and policies, but it is not used in everyday communication. The meanings of the words imply that all people who work have an occupation, but only some of the higher educated groups fill the criteria of a profession. The study of professions was strong in the 1980’s and the early 1990’s. According to Kontinen (1991) two structural features separate a modern profession from the pre-modern profession. First, expertise based on a specialised science is defined 

13 In Finland, the professions are classified into different socio-economic categories based on education and demands of work (expertise, subject orientation, risks and productivity). In 1997, nurses’ socio-economic position was changed from upper-level employees with administrative, managerial, professional and related occupations to lower-level employees with administrative and clerical occupations (Kinnunen 2001, 116). In the hierarchical classification of socio-economic status, teachers are placed in the category senior staff in education and training (category 33) and nurses in category 44 other lower-level employees. (Stakes 2004.) In compliance with these categorisations, in statistics (and at least implicitly in research as well) nurse and teacher are seen to be occupations on different hierarchical levels.

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as the central legitimising and qualification base for the profession. Professional groups refer to specialised education when they reach for the status of a profession. Secondly, the profession differentiates institutionally from other structures of the society and is organised around its own professional association.

According to Henriksson and Wrede (2004, 11), the critique towards the normativity of the concept of profession has led research in new directions. Traditionally ‘profession’ has referred to privileged, high-status and male-dominated positions in working life. In this research tradition the female-dominated areas of work are represented as defective and as occupations that have failed in their efforts to professionalise. (Henriksson & Wrede 2004, 11-12). In Finland, the turn to study state as the central agent in forming and enabling the professions took place rather early (e.g. Rinne & Jauhiainen 1988; Konttinen 1991). In the 1990’s, there was a turn in the research in the area. Studies about professions (as ideal types) were replaced by studies on expert occupations and expertise in general (e.g. Pirtilä et al. 1996; Pirtilä & Eriksson 2002).

Research and restructuring can be interpreted to be in mutual interaction. The research questions and interests reflect the general cultural and societal change towards heterogeneity, individualism and reflection. Even if there was a turn in the methodology used in social sciences and education from quantitative (survey) studies towards qualitative approaches in the 1980’s and the 1990’s, in the studies of restructuring and nurses’ and teachers’ work quantitative approach has been used by level with qualitative approach. Ideal types and conceptions (the search for similarity and homogeneity) have abundantly given way to issues dealing with e.g. identity and reflection (the search for variety and individuality). As the accounts of restructuring policies show, evaluation is emphasised as a tool of management and control in the public sector services. This can also be seen in research of the professions in question. Especially research about teachers and teaching is providing accounts, evaluations and reflections of changes in teacher’s work.
Chapter 3

The Swedish Report

Gun-Britt Wärvik

This working paper is a review of research about Swedish nurses and teachers. The review has focused on research that deals with both restructuring in education and health care and the professions or the professional knowledge of teachers and nurses. Studies with a main focus on work environmental issues related to change are excluded from the review. The paper is divided in two main parts, one about the nurses and one about the teachers.

The following databases have been used for both professions: Arbline (connected to the Swedish National Institute of Working Life), Libris (A Swedish library catalogue), and Eric. Medline, Cochrane, and Cinahl have also been used for research about nurses. A difficult point is to find research that deals with Swedish circumstances when using international databases. The option of “country of origin” has to a certain extent been useful. The literature lists of the reviewed literature have also been a very good source of information.

The Nurses

The Restructuring of Health care in Sweden can be examined according to the following periodicities.

**Late 1950’s – 1980’s**

This period was characterised by a rapid expansion of somatic hospitals and primary health care. The 1962 Medical Services Act increased the responsibility of the county councils for health care. Private beds and private fees to the doctors for inpatient hospital care were eliminated with the 1959 Hospital Law. Hospitals were also now required to provide outpatient care. The “Seven Crowns” reform of 1969 stated that patients would no longer pay directly to the doctor for outpatient care, but a fee of seven crowns to the hospital. This also meant that no private practice was to be carried out within the walls of public hospitals. Together with a compulsory national health assurance for all citizens this reform effectively eliminated all competition with private practitioners as the private alternative became too expensive for patients (Immergut, 1999). Different levels of care were also introduced related to technological development and increasing costs, from the primary health care with general practitioners and district nurses to the seven regions with their highly specialist hospitals.

**1983 – 1991**

The 1983 Health and Medical Services Act resulted in a new definition of the concept of health. The Act was a frame law and meant that the hospitals should not only be responsible for treatment of diseases but also for preventing diseases in the population as a whole. The patients also obtained a much stronger position in that the frame law stated that they also had a right to get information on, and contribute to, the care they received. Primary health care becomes the
base of heath care and special care centres (Vårdcentraler) are established where district nurses and general nurses are part of care teams together with under nurses, general practitioners and other occupational categories in the health care sector. The responsibility of the nurses at the care centres ranges from home care of the elderly including caring for the dying to group activities related to health promotion and consulting care of patients with chronic diseases such as diabetes, hypertension etc.

1992 - Present
Three reforms between 1992 and 1995, the ÄDEL reform (long term care of elderly) the handicap reform and the psychiatry reform changed the institutional organisation of health care. The result was that care of long-term patients was transferred from hospitals, provided by the county councils, to the municipalities. It is important to note that there was a focus on people in need of nursing care and/or rehabilitation in these reforms, not on medical treatment. The idea is that all care should be carried out in the cheapest possible health care level. A strong economic incentive is that the municipalities have to pay for hospital care of patients when the medical care is completed. This is expected to eliminate the risk for “over-caring” in expensive hospitals and a lack of beds in the cheaper municipality care. Another economic incentive introduced in the 1990’s is a national guarantee of limited waiting times for people seeking care for certain diagnoses defined by the state. This is one way the state can control health care.

The specialisation, the different levels of health care, and the different kinds of providers are in focus in many debates and reports related to health care. A political and administrative dream is that all patients should be treated at the most adequate level in the so-called care chain with no overlaps and no unnecessary costs in a well-organised net of coordination. The fact that the patients do not have a single disease only but multiple problems that do not follow the borders of the different care specialties causes trouble. The county councils and their health care providers have made more or less extensive changes in their economic control systems since the 1990’s to be able to follow up care paths and to be able to handle the situation as a question of rational decision-making.

Nursing Background
The sociologist Rolf Å Gustafsson (1988) argues that the nursing profession in Sweden is connected to the growth of acute care hospitals and that the profession was fully established around 1920s. In relation to medical advances, changes in the panorama of diseases in society, social policy ambitions, and societal ambitions to offer a good care on equal terms, the nurses have been facing many changes related to different way of structuring and organising Health Care. Also the form and content of their education have been shaped in relation to these changes.

Erlöw & K Pettersson (1992) offer a periodisation of nursing ideologies related to official reports about nursing training. Ideology means here a contradictory system of ideas, rules, and/or rituals as tools for action, a system that acquires meaning in a specific society with its social classes, institutions, traditions, and
conflicts. Nursing education is seen as a supporting institution in developing professional monopoly in certain definite ideologies.

The first phase is what they call “the Christian ideological phase” and is dated to 1916 and before. Tuberculosis and other infectious diseases were life-threatening. Even if the doctors could give the patients a diagnosis there was no treatment. According to Erlöw & Persson, the function of a nurse during this period could be characterised as a calling in the Christian sense.

In 1916 Sweden had 57 nursing schools and the education varied from six months up to two years and was of different qualities. The National Board of Health took control of nurse education and gradually the education was lengthened to three years. Only those who had nurse education approved by the Board could use the title nurse. Erlöw & Persson call the period between 1916-1947 “the medical ideological phase”. There was still an underlying calling but medical-biological aspects became more and more important for nurses as the possibilities to cure patients grew. Christian charity was toned down.

The next period is 1948-1977 and “the medical-technical ideology phase.” An educational reform in 1948 implied that nurses were given more medical-technical training. There was a lack of both doctors and nurses. Medical care became more and more complicated and nurse education was directed towards the needs of the medical activities. There was a strive for efficiency, ‘undernurses’ (a shorter education and not registered as nurses) and auxiliary nurses (uneducated or education up to around six months) took over work tasks from nurses. Nurses were taken from direct patient care to administrative and medical-technical aspects of work, but there were still tendencies to calling.

The last phase, “the holistic ideology phase”, starts with the Vård 77 reform when the nurse education was included in the higher education system. The phase is characterised by a criticism of medical specialisation and fragmentized care of ‘defected organs’. A nurse should be sensitive to the patient’s problem and respond with flexibility and maturity in a personal way. According to Erlöw & Pettersson, a catchword of this period is a ‘holistic view of the patient’.

**Nurses and fragmentized care**

During the 1960’s and the 1970’s the Swedish Health Care sector was rapidly expanding and there was a belief in big hospitals and rational treatment of patients. In his novel, “The House of Babel” (Babels hus) the Swedish author PC Jersild (1978) described these huge hospitals as places of hierarchy, specialisation and haste. The human beings were forced to impersonal care and sometimes frightening lack of contact. The main argument of another book, written by Ivan Illich (1975), “The Dangerous Health Care” (Den farliga sjukvård), was shocking: the Health Care system created ill-health and problems instead of decreasing them. The population became more and more dependent on professionals; old common knowledge was broken down.

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14 A Swedish “undernurse” has occupational training on upper secondary school level (3 year) and might be comparable to State Enrolled Nurse.
The two books and the following public debate are the background of a study by Bertil Gardell & Rolf Å Gustafsson (1979) with a focus on Swedish acute care and in particular the hospital ward. The Health Care system is described as being in a critical phase; old ways of working and values are contested. The report is defined as a part of this search process, looking for new thoughts and ways of acting. They compare the Health Care organisation and the growing administrative sector with Frederick Taylor and his scientific management. By using concepts such as division of labour, specialisation, class/status, government by rules and hierarchy the two researchers identify what they call the acute care model consisting of an administrative (planning) hierarchy and a medical one (those who executed the work).

However, there is not much research during the 1970’s with a particular focus on nurses. One exception is Britt Johansson (1979). In her thesis she discussed what standards in medical and surgical knowledge was required of student nurses, based on an analysis of written tests. Among other things she noticed that the instruction was mainly designed to prepare nurses for hospital work. Johansson argued that it could be debatable whether the education programme was in line with plans for the Health Care that was emphasising ambulant care and preventive treatment. An influencing body at this time was Spri (The institute of Health Care planning and rationalisation) as producer of guidelines for the nurses’ work and of “best methods”. During the 1980’s Spri also undertook much development work related to “the nursing process”. Important influences came from Finnish nurses, e.g. Katie Eriksson, and nurses from United States.

Instead, the critique of nursing care as not being oriented towards the need of the patient can be recognised in research about nurses during the 1990’s and in relation to the organisation of hospital wards. It is also interesting to note that this critique can be related to the managerial talk about ‘higher quality at a lower cost’. One way to achieve the latter has been to replace ‘undernurses’/auxiliary nurses by (fewer) nurses. In comparison to the 1970’s, this is an opposite way the make Health Care more effective. In research this shift often is regarded as something good for nurses and leading to an overall view of the patient.

One example is M Degerhammar & B Wade (1991) who studied introduction of a new system for care delivery in a surgical ward as an action research project. The current work organisation was task-centred work and the nurses felt that they were unable to give adequate care. The Lewinian concepts of unfreezing (when status quo gives rise to dissatisfaction), moving (occurs when change is planned and initiated and there is a change in a groups’ behaviour) and refreezing (a new stabilised system) were used.

Six studies examine from a from nurses’ perspective when moving from mixed to all RN (registered nurse) staffing in a surgical ward (Segesten, Ageeli, Elmcrona, Lindström & Lundgren, 1994; Segesten, Lundgren & Lindström, 1998; Lundgren & Segesten, 2001; Lundgren, 2002). The change was combined with a staff reduction (six RNs replaced 12 ‘undernurses’). A management

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15 Sjukvårdens planerings- och rationaliseringsinstitut.
motive was planned budget cuts costs, and to enhance and assure the quality of care. This should be achieved by an increased competence level among the personnel and a patient-in-focus philosophy. The latter means that nursing tasks should originate from patient needs, not from tasks, routines or rules. The individual’s conception of work was taken as point of departure and a modified grounded theory approach was used. A main concept is change, which can be regarded as a project limited in time or as some constantly ongoing. Change can be initiated from above or from below, change can be driven by methods, objectives or visions. The result of the change can be of first or second order (Watzlawick). The first order means that new patterns of old elements are created; old traditions are still there. Second order means that something qualitatively new is created. Segesten, Lundgren, & Lindström (1998) used a modified grounded theory analysis and provided the following categories related to change: a) Chaos – describes the feelings of the nurses about the change as well as the way work was managed, b) creativity – new routines and approaches to individualised care, c) freedom of choice – the nurses had freedom of choice in finding solutions to problems and in creating new structures, patterns of work and work routines, d) expanding competence – established as a management objective, the nurses had to expand the range of tasks and e) weariness – a growing feeling of powerlessness and dissatisfaction. The work was described as mentally and physically hard. Different perspectives on competence are presented but no clear definition is presented. The result showed that during a period of two years, the nurses moved from fragmented task allocation, with many and short sequences in different nursing activities, to a more coherent task allocation with significantly fewer but longer sequences in each activity. A conclusion was that the change created new working conditions for the nurses: The nurses became multi-skilled (“versatility”). They were working with first hand information about the patients (and not information from ‘undernurses’) and also with direct communication between nurses and doctors (and not by way of the head nurse). The flexibility increased as the nurses worked with fewer pre-defined rules. They developed new approaches to work which implied that the nurses should be at the bedside of the patient.

**Nurses and the middle position**

Nurses are in a middle position, between the doctors and the ‘undernurses’/auxiliary nurses. The economic cut backs during 1990’s have had an impact on nurses in that they are described as having expanded their position. In comparison with the earlier task oriented system, where the cheaper ‘undernurses’/auxiliary nurses could replace the nurses, the nurses are the winners in the new lean organisation. A nurse can replace an undernurse, but the opposite is not possible.

In her study, Gerd Lindgren (1992) describes the hierarchy on a surgical ward. She identified three ‘cultures of cooperation’: 1) The girls, i.e. auxiliary nurses and ‘undernurses’ who live in a collectivistic culture of cooperation characterised by a “we-spirit” that give social security. “Likeness” is important. 2) The sisters, i.e. the nurses, belong to a corporative culture of cooperation. This is a middle position based on individuality and personality. The position is unstable and builds on alliances upwards and downward which leads to eagerness to change and flexibility. Among the doctors a cooptative culture of
cooperation exists. The membership is based on formal and informal criteria. In a follow up study Lindgren (1999) noticed a changed Health Care organisation with a new line of authority, decentralisation, purchaser-provider model, payment to the hospital department due to performance. The aim of these changes was a higher quality of care at a lower cost. Nurses and ‘undernurses’ worked in teams and this had resulted in a more patient-centred work for nurses. The patients also stayed shorter period on the ward and the flow of patients had increased. Lindgren noticed that the different cultures of cooperation have started to erode. The nurses had adopted a new co-worker culture, characterised by individuality and striving to break down professional - and gender barriers. This culture demanded better cooperation with the doctors and more responsibility from the ‘undernurses’. According to Lindgren, the “alliance-orientedness” had given nurses influence of organisational changes and strengthened their position in the organisation. They had worked for changes in line with the new organisational model. Their professional ambitions had been compatible with raise of competence, quality assurance, and units responsible for economic result.

Lena Lannerheim (1994) addresses how boundaries of different types of work are legitimated and their consequences. She uses the concept closure (Weber) which here is related to the monopolising group defining other groups as subordinated and unqualified. Exclusion is legitimised by reference to codes (examples are race, gender and class). Another concept is professionalisation meaning that practical skills are growing from an abstract system of knowledge. Control of the abstractions that generate the practical skills gives control of the profession. The background of the study is the striving for reward and competition within the Health Care. The central issue is the Health and Medical Services Act of 1982, a ‘frame’-law that deals with medical and administrative responsibility. The doctors lost their previous rights of total (medical and administrative) responsibility for a care unit; the responsibility could be divided. This meant that nurses could have administrative responsibility for a care unit (1987, 83 nurses had such a responsibility). In 1990 the law was changed with only small possibilities still remaining for other professions but doctors to get total responsibility. Another outcome from the law of 1982 was that nurses, via their federation of trade unions, strategically tried to move their positions forward by claiming an independent care responsibility (nursing care as opposed to the doctors, medical care). Lannerheim argues that rationality and status are closely related. Tasks that before the change in legislation and education were seen as less attractive (administrative tasks and caring), changed character and became attractive. The nurses took over work tasks from the doctors (lack of doctors, they had to much to do and its was rational to let the nurses take over). When the supply of doctors is increasing, they take the tasks back. Caring becomes an area of interest for nurses, a threat to both ‘undernurses’ and doctors.

Albinsson & Arnesson (2000) have studied the relationship between organisational structure, gender, and power. Culture is here the same as dominant norms, values, and unwritten rules. Subcultures have different languages, in Health Care these are related to different occupational groups. Gender is regarded as something constructed and reconstructed in a social and cultural context. The result showed that the work was still task oriented to
achieve maximum efficiency. The middle position of nurses, with demands from ‘undernurses’ to carry out patient care and from doctors to carry out medical-technical and administrative work was described as a dilemma.

**Nurses and the state**

The aim of Lars Evertsson’s (2002) study is to show how three occupations (nurses, home relieve helpers and occupational therapists) have emerged and developed in interaction with the (welfare) state and within the framework provided by a general Health Care policy, family policy and work rehabilitation policy. Evertsson’s primary interest is the ways the state’s welfare political commitments have influenced the professional aspirations and development. Organisation is described as a form of human interaction characterised by belongingness, collective resources, control and replaceable individuals. An organisation can be of four different kinds: state, companies, voluntary organisations and families. The state is seen as a historically conditioned actor, as an organisation of organisations and not as a static and unified actor. A profession is here the same as the struggle for jurisdiction on the legal arena (the states administrative, planning and legislative structures). A conclusion is that the states’ welfare ambitions have contributed to the transformation of the three occupations. For nurses, the encounter with the state meant regulation (during 1920s), monopoly regarding education and professional work. The nurses succeeded in establishing clear jurisdiction in relation to the more practically trained hospital nurses. This paved the way for nurses to claim a superior position within the work organisation. With the help of the state, nurses advanced their professional position. By the mid 1960’s their position in hospital units could be called an occupational monopoly (the licensing of nurses). Nurses had a well-defined jurisdiction in relation to auxiliary nurses and medical-technical assistants. According to Evertsson, it is difficult for welfare states occupational groups to steer their professional project in a direction that falls outside of the state’s welfare political commitments.

The aim of the thesis by Helén Strömberg (2004) is to study how Health Care institutional frames, organisational structure, and production process have changed since 1960. Her research questions concern how legislation has governed and changed priorities and thereby affected the care that should be produced (political institutional and economic frames). Within these frames, how is care production organised and with which structural changes? In what way has the vertical division of labour changed including care chains and relations between occupations and tasks. ‘Production process’ of Health Care work (sw: vårdarbete) is an umbrella term for all the work that is done in the Health Care sector. The work process is described as divided in technique-intensive care, mixed care, and work intensive care. Division of labour means here different occupations and positions people have within the Health Care sector. Gender division of labour is kinds of occupations, positions and work tasks women and men have within the Health Care sector. Horizontal gender division of labour between curing, nursing, and caring is performed by different occupations with different norms for what is seen as female and male respectively. A vertical division of labour between curing, nursing, and caring looks different in different parts of the production process. This also means that the work can switch gender code. The study showed three big changes since
1960’s: 1) The Medical Services Act of 1962 – responsibility transferred from the state to the county councils which where given increased responsibility for public health, 2) the Health and Medical Services Act of 1983, 3) implementation of several reforms between 1992 and 1995 when responsibility for long term care was transferred to the municipalities. The population’s panorama of diseases has changed as well as the demographic structure with an increased number of those over 80 years. Hospital care has become more specialised. Advanced medical technology have been an essential part of care and altered the traditional work tasks of the nurses. The same work tasks can have different status depending on whether the work is performed in technique-intensive or labour-intensive care. For nurses, tasks that use technology have been more curing-oriented and tasks that deal with daily care of patients have been more caring-oriented. Technique-intensive care has higher status. Men, no matter where in the nursing process they work, do not work with caring tasks. The gender system supports the fact that men tend to work with technical nursing tasks (where the patient is sleeping). Nursing has a middle position in a vertical structure of different caring professions and is represented in all types of care.

Nurses and new economic conditions of health care
In her thesis, Maria Blomgren (1999) has studied the encounter between new management accounting models and Health Care professionals, mainly nurses. How do different groups act and react in response to management accounting models? What impact have these models had on Swedish nurses’ ambitions to strengthen their position as a profession? Blomgren takes an institutional point of departure meaning that cultural rules give meaning and value to particular entities and activities, and these rules are decisive for which forms of entities and activities that are at all possible. By logic she means a set of material and symbolic constructions. Different institutions provide people with different kinds of logic; these different logics may not be compatible with each other which give space for contradictions and change. Change means a shift in institutional logic, not merely changes in techniques. The shift in the management accounting system represents an institutional restructuring, implying a fundamental shift in socially constructed norms, values, beliefs, and ideals concerning organisation and management of public sector. This is discussed from two perspectives: a) Accounting management in a reform perspective: accounting as part of a rationalised reform, used to gain legitimacy and to be perceived as rational, but not necessarily something fully implemented (decoupling – a gap between talk and action, window-dressing and gameplaying) b) Accounting management as a social and institutional practice: accounting plays a major part in the construction and shaping of social and organisational relations and structures. The potential is due to its capacity to make things visible. Accounting does not represent objects that exist but contributes to the creation of the world as we perceive it. Therefore, management accounting has a powerful potential. The thesis is based on three studies. The first study has a focus on a salary incentive system. Accounting was viewed as part of rationalised reform. The result showed that the incentive system was decoupled from the practices of the professionals and occupational groups. The second study involves nurses in profit centres (sw: resultatenheter). The hospital was part of a purchaser-provider model. Has profit responsibility helped or hindered
nurses professional aspirations? The point of departure was accounting as constitutive of social and institutional practice. The result showed changes for the nurses: the position of the head nurses who had got economic responsibility was strengthened, the boundaries of the hospital departments were reinforced, the nurses became cost conscious and changed their routines. However, the nursing caring activities had suffered. There was lack of time, and practices related to nursing suffered when priorities had to be chosen. The third study analysed the debate in the Swedish nurses’ trade union journal between the years 1991-1995 concerning the introduction of purchaser-provider models, profit-centre models and quality-assurance programmes in the Swedish Health Care sector. The result showed that the nursing profession changed their attitude towards the new management accounting models over the period studied, from being sceptical to using and influencing the models in order to promote the nurses professional aspirations.

The aim of a study by Ingrid Heyman (2000) is to study how practical Health Care is affected by restructuring, and to gain insight into nurses’ stories about this restructuring. Their stories are about changes during the latest 5-10 years. Reorganisation, reduction, replacement of personnel, reduced economic resources are touched upon in all stories. Behind these changes are overall political decisions. How do the nurses handle the consequences of restructuring? What strategies do they develop? The analytical concepts are dispositions, positions (Bourdieu) and breakpoints. Dispositions can be changed during situations we come across and by doing experiences. We constantly reorganise our knowledge and form it to structures, relevant for the new situation we encounter, and thereby economise with our resources. If the new tasks are judged impossible, the nurse must leave her position. The stories are discussed in three themes: 1) learning, 2) something is wrong in the system or burn out, 3) loyalty with the county council or exit. Learning is a strategy to develop professionalism at work and to maintain or improve competence. All nurses talk about burn out, from small stress reactions to totally losing one’s foothold. Two of the nurses remain in the public Health Care system. They strive to develop professionalism and their work. They keep the discussion about quality and the devotion to the patients going. Two nurses leave the county council. The analysis points to different individual breakpoints.

Brorström, Hallin & Kastberg (2000) have studied a changed management model within antenatal clinics and its effects on the activity of midwives. The central question concerned the midwives’ perception of the new model. The new management model meant that the antenatal clinics were paid according to performance. The county council clinics also had responsibility for a specified district and got extra money for this according to the social structure. The theoretical point of departure is neo-institutional. A main concept is adaptive efficiency meaning an organisations ability to adapt to changed circumstances and includes a long term perspective related to development of the activity. The result shows that the midwives adapted to the new model in three ways, a) they stopped (e.g. parents groups or acupuncture), or b) reduced (e.g. cooperation with social services) activities they did not get money for, and expanded activities that generated resources (the patients). The midwives had also adapted to an economic way of thinking (costs and revenues), and that the money were
related to the patients. It was obvious for the midwives that the economy was related to their actions. The midwives had also changed the rules in the model to fit the actual circumstances, e.g. an extra “visit after delivery” was recorded as a “contraceptive visit”. This was against the rules of the model or a grey zone. The authors interpreted this as an expression of medical and caring norms, and that these norms were more important than economic rules for the midwives. It was also obvious that there was a conflict between professional norms and economy. This also included a worry among the midwives for their employment security. The authors also pointed to that the change, from overall budget to reimbursement related to performance, meant that the purchasers could increase their possibilities to control content and aim of the care. The professionals’ space of action was reduced.

The aim of the study by Lindholm, Sivberg & Udén (2000) was to explore the meaning, exposition and application of nurse manager’s leadership styles within the organisational culture of the changing Health Care system. Nurse managers have to act under the pressure of a changed and restructured (decentralisation) Health Care system as managers of people, operations, budgets, and information.

The thesis of Kerstin Nilsson (2003) does not explicitly deal with change or restructuring but the author points to decreasing resources, reduced number of staff, reduced number of beds and days for hospital care, and decentralisation during the 1980’s and 1990’s together with changed work organisation, which means that nurse mangers have got responsibility for economy, staff, administration and nursing. According to Nilsson, this is a shift. The previous head nurse was a nursing ideologue, a nursing developer and an assigner of work tasks.

Sweden has a very short history of privatisation of the Health Care. Jan Öhrming & Mats Sverke (2003) have analysed two hospitals in Sweden. The focus is on all (management) employes, nurses are included in the study but not explicitly analysed. One of the hospitals, S:t Göran’s Hospital Inc., was made a non-profit public stock company in 1994 and a for-profit private stock company in the end of 1999. Södertälje Hospital remained a non-profit public administration unit over the course of the study. Both hospitals are a part of Stockholm county council, the most privatised region in Sweden, a process that started with S:t Göran in 1994. The main concept in the study is uncertainty. The concept is connected to the carrying out of work, and not existential uncertainty. Such uncertainty can arise as a result of lack of information in the work situation, lacks of competence, or that the individual is unfamiliar, inexperienced, unenlightened or uninitiated. Information in work situations can be ambiguous, equivocal or hard to interpret.

Nurses and the transfer of care of elderly to municipals
Mainly nurses have been oriented to hospital care. Three reforms in the beginning of the 1990’s changed this. After the three big reforms in the beginning of the 1990’s, the handicap-reform, the psychiatry-reform, and the ÄDEL-reform (care of elderly) respectively, nurses more and more are employed by the municipal home Health Care and with outpatient care.
Kapborg & Svensson (1999) take the transfer of the care of elderly from the county councils to the municipalities as point of departure. This kind of care does not include care given by doctors but there are functions as ‘special medical nurses’. Nurses within municipal Health Care carry a sole responsibility for large groups of care receivers. Therefore, they often have to delegate drug administration to subordinated staff. In this study, cases of malpractice are analysed. The study also concerns nurses perceptions of their knowledge within the area. A conclusion is that through the transformation of elderly care, nurses have been given a new professional role with new competence demands, requirering them to make independent judgements and to take initiatives of their own.

In the study of Kristina Westerberg (2001), the aim is to examine explanations of conflict at work made by managers in municipal elderly care during a period of organisational change. How gender is made visible and possibly related to the history of the work activity is a special question. During the studied period there was a reduction of expenditure in the public sector (early 1990’s). The 1992 reform incorporated nursing homes into the municipal organisation. A main concept is ‘voice’ which here refers to the socioculturally situated voice and to the Bakhtinian notion of social language. Social language shapes the speakers voice and is a discourse, characteristic of a specific group, within a given social system at a given time. ‘Constructions of gender’ are processes within the organisation, as container of and maintainer of societal gender-based structures and are visible as gendered voices. Another main concept is ‘contradiction’, regarded as tensions and conflicts related to the object of work activity, i.e. to what the activity as a whole is directed. Six themes of conflict are identified. Two of them, ‘focus of work’ and ‘two cultures’, point to a historical tension in this type of activity, the medical base and the social base. Three major voices are identified: ‘social home orientation’, ‘medical care orientation’, and ‘social management orientation’. These voices are more than just historical expressions; they are also three different constructions of gender. Westerberg suggests a new concept, ‘activity identity’. This concept is broader than individual professional identity in that it includes the history of the activity.

Nurses and their education
The background of the thesis by Ewa Pilhammar Andersson (1992) was the 1982 Higher Education Act which brought nurse education to the direct control of the National Board of Universities and Colleges. A two year study programme were established at a number of higher education centres. Entry regulations were changed. This also meant that the all nursing students had a previous work experience as ‘undernurses’ (and education: nursing line at upper secondary school, two years). The aim of the research was to describe and analyse how a group of nursing students value their previous experience, what assumptions they have about nursing, and which perspectives on nursing, education, and professional function the students work from during their education. Nursing was believed as being an outcome of a) division of labour, b) competence, c) professional relationship, d) personal qualities. a)and d) were predominant at the start of the programme, a) was still predominant at graduation but had been eroded by b) and c), d) was not seen as important. Nursing as an outcome of
scientific attitude and scientifically grounded working procedures were lacking, despite the stated aims of the programme to promote this.

In another study, Pilhammar Andersson (1994), studied nurses with different educational backgrounds and their perceptions of the profession and how education had prepared them for this. The educational programmes were the 80 points (2 years) programme were the students came from the two year nursing line at the upper secondary school, and the 120 points (3 years) programme based on a general upper secondary education. The result showed more similarities than differences between the two groups. An explanation was that the nurses had been trained into the same value system which can be related to the content during the education as well as to what is traditionally regarded as characteristics of the nursing profession. The analysis was based on critical incidents and inductive classifying.

**Nurses and the gender question**

Sune Dufwa’s (2004) thesis deals with the male integration in the profession of nursing during the last 50 years. In 1951 the government ruled that men should have the opportunity of training to be nurses (there was a lack of nurses). The aim is to analyse how relationship between women and men are formed and change when one of the gender joins a profession dominated by the other. Main concepts are: 1) Gender division of labour (labour (and family)) is an essential feature of the capitalist society, 2) masculinity, 3) patriarchy, 4) gender, 5) feminism, and 6) closure. The study is structured in four themes. The first theme examines the background for the decision to employ males (mainly materials from government inquiries). The first male nurse graduated in 1953 (a background as mental health nurse, 44 years old), but men did not begin to take a more significant role in the profession until 1970’s. Many schools were doubtful whether to take applications from men. They had difficulties accepting older and in some cases married men, unmarried young women were the target group. The dominant view was that men should be the breadwinners in their families. Female nurses feared that men would not comply with the norms of the profession. “Legitimation” is seen as important and a base for a successful strategy of closure. Male nurses from the mental Health Care sector were manoeuvred out of higher posts. Other female nurses hoped that men would have a more unionised attitude and raise salaries. The second theme analyses the problem of what nurses should be called after men entered the sector (debate in nursing journals). Should the term ‘sjuksköterska’ also include men or should a more gender neutral term be used? By 2000 the matter appears to have been closed (a feminist attitude). The third theme deals with salaries and the forth theme is about career paths. In the 1960’s there were a lot of applications from men to teaching and administrative-related career path but in the 1990’s the women fill these posts. Between the 1960’s and early 1990’s men were highly influential in the union movement but there is a trend change from the early 1990’s when men begun to disappear from representative posts. Why so few male nurses? Dufwa argues that the hegemonic masculinity of the society defined nursing as a feminine and low-salaried profession with a low status in a reproductive and consuming sphere. Nursing is not seen as masculine among either men or women. Men who enter the profession may find their masculinity questioned by their colleagues. Around 28% of men who graduated from
nursing school between 1960 and 1990 have left the profession for other careers. Psychiatry is the only area in Health Care where niches can be found without any female nurses.

A related study is H Robertsson (2002) who has studied how the construction of masculinity contributes to the production and the reproduction of gender segregation in Health Care, and particularly among nurses. His main concepts are masculinities and he argues that dominant forms of masculinity are not self-evident or unchanging, it is not a homogeneous, unified or static category. Hegemonic masculinity refers to the dominant, and commonly accepted masculinity in a hierarchy of masculinities. Homosociality means that men turn to men. Homophobia is the boundary for what is seen as masculinity and masculine behaviour, and is also a boundary within homosocial relations.
The Teachers

Restructuring in Sweden can be seen according to the following periodisation according to Lundahl (2002).

1945 – 1975: Construction of the modern welfare state - The strong state
Equal education opportunities were seen as important in creating a fair and equal society. In the 1970’s, the economic situation in Sweden became more unstable, increasingly the welfare system was questioned from different directions for being ineffective, too expensive (“the right wing”) and the education system was not able to reach societal goals of equity and fairness (“the left wing”).

1975 – 1990: Changing demands from Society
Women entered the labour market with a following need of day-care for children. The general educational level was rising with the expansion of secondary and higher education and also of adult education. There were small efforts to decentralise the school system but state governance remained strong.

Sweden joined the European Union in 1995. In the beginning of the 1990’s Sweden was facing a very deep economic recession (culminating in 1993-94) and unemployment was rapidly rising. The number of refugees was increasing. The decentralisation of the education system accelerated with reforms including market and choice models. Independent schools were established combined with a voucher system so that the pupils and their parents could choose between the different schools. Parents and pupils gained increased influence in schools. All upper secondary education, including vocational, became 3-year programmes with a common curriculum in certain core subjects. State subsidies were now given to municipalities as lump sums and management by objectives was stressed. According to Lundahl, the period followed the traditional welfare model but there was also weakening of state governance in that individual and local responsibility and self-regulation was emphasised.

1999 – 2002: Educational Problems Remain
There are differences in grades and achievements related to gender, social, geographical and ethnic background. Teachers describe heavy workloads related to big classes and budget reductions. Decentralisation and management by objectives is even more emphasised including quality audits. Special state funding is also now directed to the municipalities and to certain specified areas. A question is if this means a stronger state (Lundahl, 2002)?

Background
The Swedish 9-year compulsory school was implemented in 1962 and replaced the former parallel system with the ‘Folkskola’, established in 1842 as a compulsory school system for all people, and the ‘Realskola’, an older school system with roots in the middle age, for the more privileged groups in society. Only the ‘Realskola’ was a path to higher education. In 1970 the upper...
secondary school was also unified when the previous school forms of gymnasium, continuation school and vocational school respectively were integrated in one organisation. The intention behind the reforms was that children should get the same educational opportunities, regardless of gender and social, economic and geographical backgrounds. As studies by Torsen Hüsên and Kjell Härnqvist (ref) had shown, there was a ‘reserve of talents’ with a capacity to enter upper secondary and higher education. However, traditional educational paths prevented them in that the paths were not qualifying for further education. The means to implement the reforms was central directives in detailed national curricula and other rules about school economy, organisation, and staff.

**Teachers in school development research**

Despite the big school reforms there was a growing realization during the 1970’s that the schools did not live up to all expectations connected to the reforms. As Lisbeth Lundahl writes:

> “Despite the fact that all Swedish children went through a nine year comprehensive education and a large majority also received an upper secondary education for another two or three years, class and gender differences, and differences between manual and mental work were largely reproduced in schools and in society.” (Lundahl, 2000:167)

A new reform strategy beginning in the mid 1970’s was that orders from above should be replaced by local decision making. The state was still an important actor but teachers and other local actors got more possibilities to influence the school. A revised national curriculum guide for the comprehensive school in 1980 (Lgr 80) emphasised that each school should present a work plan for how to achieve the centrally formulated national goals. To enhance the introduction of Lgr 80, state subsidies are introduced to support the local development work and in-service training of teachers. This means that the teachers’ own developmental work increasingly became regarded as important and also teachers as initiators of change. There was also money allocated to teachers development work.

During the end of 1970’s and onwards a large number of research projects about local developmental work and about school and change has been carried out that can be connected to these changes in policy. To a large extent this research has been financed by Swedish National Board of Education.

One example is a study by Sverker Lindblad (1980) with the aim to point out and discuss relations between educational policy, reforms, and innovations. He takes a conflict paradigm as a point of departure meaning that contradictions are the driving force of change and also can explain educational reforms. Power relations are regarded as of societal, organisational and individual nature and are a result of historical processes. A point of departure is that they can be changed by human intervention. Educational developmental work – as production and distribution of innovations – is a part of a reform strategy, provided that the innovations have an intention of realisation of the reform, and that they actually
have an impact on the periphery and can be of different kind: 1) political/societal – contradictions and state of power in society, 2) political/educational – contradictions and state of power in the educational system, 3) pedagogical/societal – pedagogical consequences of the education in the society, and 4) pedagogical/educational – implications of pedagogical actions for the educational system.

In her thesis, Ingrid Carlsgren (1986) has studied ‘school-based innovations’ in relation to the establishment of a local curriculum in accordance with the central one and connection of innovative activities to it. The study is divided in three parts, the official perspective, the teachers’ perspective (a phenomenographic approach) and the productive perspective. The aim is to illustrate the phenomenon and analyse what it is supposed to be, what it is about to be and what it can be. The concept of change is used as a) vertical change meaning improvement of practice from the practitioners’ point of view, and b) horizontal change meaning change from an old kind of practice to a qualitative new one.

The background of a study by Erik Berg (1989) is the SIA-reform from 1976 (‘the Internal Work of Schools Reform’). The SIA-reform implied a new decentralised system of state grants but also change of traditional methods, forms of work and established occupational roles among the teachers and heads. Group based rather than individual-/subject-based organisation was emphasised. The aim of the study was to reflect on some findings from a follow up study. Berg uses the concept of coupling (Weick) between mandator and executive levels of a school as an institution. Loose coupling means that constituent parts of an institution are disconnected, a lack of cohesion leaves imprint on all activities of the institution. Tight coupling means that the activities of an institution rest on firm ideological foundation and leave their mark on day-to-day activities. A conclusion was that reform implementation presupposes tight coupling between mandatory and executive levels of a school as an institution. Reform implementation strategies, i.e. alternative ways of handing down reform aims from a mandatory via an executive to the level of actual activities can be of different character but tend to overlap: a) ‘top down’ – detailed decision-making at the top level, documented in rule systems, limited scope for local decision-making), b) ‘boundary control’ – the outer boundaries of activities are specified, the scope for local decision-making is within these boundaries or c) ‘goal control’ strategies – people controlled by these goals may themselves select the means of achieving them. Berg defines profession as practitioners of an occupation who possess specific knowledge and who act independently to offer certain clients a specific service. A basic condition is that this must be sanctioned by the environment in which it is carried out. Restricted professionalism is when teachers act largely as implementers of central directives, the knowledgebase they need is confined to a sound knowledge of their subjects and of teaching methods. Extended professionalism is when teachers also act autonomously outside the classroom, the occupational role is described as ‘freedom with responsibility’ the knowledgebase is not limited to subject knowledge and methods, but also includes the aims of the reform and the conditions for local school development.
During the first half of the 80s’, 35 school management areas participated in an evaluation study focusing a new curriculum (Lgr 89) (Ekholm, Fransson & Lander). A study by Ulf Blossing & Kerstin Lindevall (2003) is a follow up. The aim is to study the impact of 15 years of restructuring. How has the work organisation been developed? Have collective forms of cooperation increased? The teachers are characterised by the following concepts: a) solitary – the teachers do their own planning work – only minor co-operation, b) personal co-operation – small groups of two to three teachers co-operate in their daily work, co-operation by interest – based on affiliation of importance for work, regular and of importance for teaching, and d) Team-cooperation – a work team according to the intentions of the curriculum.

In the 1990’s the balance between the state and the local level again was shifting in relation to new reforms (Lundahl, 2000). The Parliament made the decision that teachers should be employed by the municipalities instead of by the state in 1989. From 1993 onwards the state subsidies to the municipalities were given as lump sums. Independent schools on primary and secondary levels, open for all with help of tax money, are established. A voucher system implies that all pupils and their parents can choose between different schools.

Curriculum guides for the compulsory school and the upper secondary school respectively was introduced in 1994 (Lpo –94, Lpf –94) including goals to reach and goals to strive for. The new curriculum guides are less regulating than the previous curricula and encourage teachers to use the teaching models they find necessary related to the need of the individual student. Another change during the 1990’s is that school boards with a majority of parents are to be tried out (Lindblad & Lundahl, 1999).

In relation to a number of studies during the 1980’s about teachers’ and their attempts to change the direction and form of their work, Lindblad (1994) asks two questions: What is the meaning of teachers’ creative activity for what is going on in school? What is the meaning of the development and the control of the education system in relation to the form and the direction of the teachers work? The innovative activity is here seen as determined by circumstances of which it is a part of, and can also be seen as a result of deliberately acting human beings trying to find new ways in their job. The theoretical perspective is based GH von Wright’s analyses of human action. An important analytical concept is ‘logic of events’ – the interplay between situational change, intentionality, ability, and a motivational and normative background. Teachers’ practical thinking can therefore be understood as a part of and as an outcome of a network of different determinants in concrete cases. What impact the different determinants have is dependent on the concrete situation. Lindblad also concludes that the teachers’ development work has had the character of isolation and invisibility, the exchange of experiences between teachers has also been very limited.

Here a study by Ingrid Carlgren & Sverker Lindblad (1991) can be mentioned. The aim is a critical discussion of aspects of the ‘teachers thinking’ tradition where actions performed by ‘reflective practitioners’ are depicted in terms of teachers as free-floating intellectuals. Another aim is to picture how teachers
who are changing their teaching conceive external determinants. Also here the analytical concept of ‘logic of events’ is important. Carlgren & Lindblad argue that to understand the logic of events in teachers work, external determinants of teachers’ practical inferences must be considered. A way to gain insight into the ways the external determinants work is to describe them from the teachers’ point of view. A conclusion is that context – connections between teachers’ practical reasoning and the context within which they work – is important for teachers in their practical reasoning when they try to achieve changes in their professional world. But context is neither present to the teachers, in their stories, in theoretical terms concerning school in society, nor about the organisational framework. Instead the close personal relations are conceived of as being decisive in the teachers’ eyes.

The aim of a study by Daniel Kallós and Ingrid Nilsson (1995) is to analyse the Swedish compulsory school from the point of view of teacher influence. Focus is on attempts to regulate aspects of teachers work. Issues of power and control over contents, methods and evaluation of classroom work are discussed. They describe three phases related to school reforms and with different kinds of teachers. 1) ‘The teachers of the comprehensive school’ are related to the introduction of the comprehensive school and its quantitative expansion. The teacher was explicitly and implicitly defined as an agent of the welfare state. Schooling was seen as an instrument to enhance the development of society. 2) ‘The regulated teachers’ – from the early sixties to the mid 70s – is a phase when teacher autonomy decreased and there was an emphasis of creating uniform schools, centralised ordinances and rules. 3) ‘The deregulated and decentralised teacher’ – from the late 70s and 80s – is a period when teachers were expected to take part in local developmental work. Municipalities, schools and teachers formally became more autonomous and the state rules more indirect. The new deregulated teacher is defined from above. 4) ‘The autonomous teacher on the market’ introduces an attack on the welfare state, it is not via the national curriculum the new ideology manifests itself. The two first periods are dominated by state planning. Teachers are regarded as civil servants carrying out tasks defined from above. A rational planning model dominates the first three periods.

The aim of the thesis by Lind (2000) is to study teachers’ endeavours to professionalise in connection with developmental work in the school. How well can teachers’ endeavours be interpreted and understood in relation to the professionalizing strategies of closure, i.e. to maintain or achieve internal or external occupational control, and alliance, i.e. an opening strategy aiming at strengthening the own position? According to Lind, professionalism amongst teachers is pointed out as desirable in relation to decentralisation and a change from control by rules to control by objectives. School organisations are seen as characterised by conflicts between central control and allotted resources and demands from school context. By profession Lind means features that characterise strategies used by professionals to maintain or promote their own position or status. Professional status is how one’s own personal esteem and position are understood in relation to those of others. Lind concludes that the teachers’ strive for professionalisation was directed towards both competence and position. Position and improvement of position was seen as decisive for the
The teachers used both closure and alliances to maintain and improve their own position.

The preposition that no change is possible if not initiated by the school itself is tested against experiences from a school developmental project in a study by Erik Wallin (2002). The author is involved in a developmental project in one school, initiated by the local politicians (municipality) in 1995. The project implied change of work organisation, physical environment and pedagogy/didactics. The children were organised in age-mixed work groups, and the teachers in work teams connected to the pupils work groups. Change is here seen as a neutral concept defined by criteria. Development also includes values and says something about how conditions should be. A main concept is institution meaning that human beings shape and develop their identity together with other people, this take place in contexts that can be called institutional. The school as an institution does not have a total but a relative autonomy against the state. An institution is constructed of communities of values, sanctioned by the societies and thereby commonly accepted as goals or systems of rules on the operative level. The operative level is the organisation – a systematic established community of people with the aim to reach specific targets. Change is the same as moving all this – the attempt is enormous, even if the relative autonomy of the actors is acknowledged. A ‘relative autonomy’ gives space for actors to act and deviate from institutionalised norms and thereby adapt to constantly ongoing societal changes, superior to the school. A conclusion is that “we exist in our words and in our memories /…/ this means that it is neither probable nor sufficient that ideas about and an initial impetus for change emanates from within an institution. Institutions cannot, at least by their own power, lift themselves by the hair”.

The research program “School culture – an element of success?” funded by the Swedish Association of Local Authorities is carried out at the Swedish National Institute of Working Life (Persson, 2003). A point of departure in the program, related to proclamation of the funding, was that schools are stable and not eager to change. Another point of departure was that something is wrong with the Swedish school and that this must be changed. The program used the concept of culture in different ways in its different studies. In their study of school cultures and school leadership, Anders Persson et al. (2003) take the question how school management is carried out related to the specific school culture as point of departure. Culture means here the result of on one hand, adaptation of the school to the environment – and the pupils have a particular role as mediators, and on the other hand, how different actors are integrated in the school. Three different cultures are identified: a) the compulsory culture, b) the career culture and c) the knowledge culture (see also Persson, 2004). The authors describe tensions between the school manager (head master) and the teachers: a) being a representative of the employer and nearness to the staff, b) being a person who maintain order and being a democratic leaders, and c) change leader and stabilizer. Different strategies to handle tensions are identified: a) building alliances with teachers (compulsory culture), b) building alliances with parents (career culture), and c) building alliances with (active) pupils (knowledge culture)
Hans-Åke Scherp & Katina Thelin (2004) have studied school development as an action research project in six schools. The aim is to study how it comes that some schools, in their own and in others view, are regarded as developmental-oriented. 56 teachers participated in the research process. The main concept is ‘development’. Development means here change. However, not all changes are development, development implies that something is better than it was before. But no development process is similar to another one. Development is conscious and knowledge-based changes, incorporated in the school-culture and the daily routines.

**Teachers’ extended responsibility**

The background of a project carried out by Anders Persson & I Tallberg Broman (2002) is that schools and teachers are given an increasing responsibility not only for teaching but also for the upbringing of children. The authors argue that this extended responsibility is connected to a changed view of the children in the postmodern society, to democracy and the right of the citizen. Teachers are thereby confronted with new work tasks and the teachers’ professional identity is challenged and questioned. The plurality of the post-modern childhood is confronted with an institutional ideology demanding homogeneity, stability and normality. The aim is to study how this responsibility is divided up between school and parents, at present and earlier. A main concept is ‘institutional ideology’ which is formed by professional actors during the long period of the institutions construction. Institutional ideology structures the staffs’ daily activities and their view of children, parents and the function of the institution, it form and prescribe ‘the normal’. To this should an historical aspect be added meaning that preconceptions are slow and difficult to change. A conclusion is that problem ridden discourses of child- and parenthood, together with stress laid on security as the most important institutional aspect, based on a pedagogy oriented towards individuals, an extensive and partly new social pedagogical preschool- and compulsory school project is developed. In a deeper sense, this represents a “quite different job” for the teachers.

The theis by Ulla Karin Nordänger (2002: Lindqvist & Nordänger, 2004) focuses teachers and their recess periods (the field that is studied). The aim is to generate theory of data through a grounded theory approach. The concepts are developed in the following way:

A core category: Interaction alertness (“thousand things on the side”) and two domains:

1) Ambition (does not apply to professional ambition generally) is here something displayed in ‘the public sphere’, a place where teachers can distinguish themselves from others, notices a focus shift from the classroom to ‘all the rest of it’ – school development groups, documentation, action plans etc, is a measure of how a teacher’s level is assessed in the profession – the interspace is reduced when recess periods become public sphere.

2) Professional content – officially defined and extended professional content is regarded as too much and too complex.

→ main concerns of the field: what kind of interactions alertness can be connected to outbreaks as stress and burnout? What is an interspace really and how is it constituted?
Nordänger then turn to the formal theory and Goffman. She discusses ‘abstract sociality’ meaning abstract relations lacking intimacy, related to official sphere. The lost interspace is understood as the back regions. Another concept is ‘backstage’, a place where teachers, under different conditions from what public appearance demands, constitute themselves and the façade that characterises their front stage appearance. A grounded theory is then developed: Teachers seem to have lost control over the interspace. Everything can be judged; the public sphere is spreading out. There is also a counter movement in the teachers’ attempts to recreate situations of personal nature.

In his thesis, Per Lindqvist (2002; Lindqvist & Nordänger, 2004) takes teachers’ non-regulated working time as a point of departure. This means planning, preparation, correcting and spontaneous contacts with pupils and their parents. The aim is to generate a grounded theory about the work done by teachers using this time taken on trust as a point of departure. The concepts are developed in the following way:

‘Unfinished character of teachers’ work’ – condensed working day, uncertain pupil response, complexity

Mental alertness – Thoughts as bonds – Thoughts as companions

‘Activity-oriented focus’ – the teachers’ orientation is on their own performance,
‘Success-oriented focus’ – the teachers’ orientation is directed towards the result of the activity. The two categories are not regarded as connected to individuals but to their thoughts and actions. Lindqvist describes a continuum between the two pools.

The aim of a study by Anders Persson & Helena Staverski (2004) is to confront notions of an unchanging and stable school with notions of change on the ‘production floor’ of the school. Another aim is to understand these different, contradictory, and simultaneously existing notions about changes of the school (compare Persson, 1993) and the research program “School culture – an element of success?” Three different forms of change are described: 1) Transformation – the transformation of children and young people to pupils. The pupil as a role, formed within the frames of a specific institution, 2) adaptation – children’s and young people’s resistance (often unconscious) to becoming pupils results in a powerful pressure of change in the school, in particular directed towards the teachers. Adaptation to the pupils, and their situation inside and outside school, demands a different teacher role than before. Adaptation is a pressure of change from below, and 3) reform – the aim of reforms is to change the way teaches work with the pupils. Reform is a pressure of change from above. A conclusion is that many of the reforms are unnoticed just because the transformation of and adaptation to pupils – in larger and more demanding groups, and with more and expressed particular needs, and more or less demanding and supporting parents – are in focus. However, the choice of the single teacher is an adaptation to factual circumstances, rather than to the intentions of the reforms. Sometimes this takes the sting out of the reform.

In a study by Anders Persson (2004), the school is regarded as an arena where different actors are acting, meeting, and creating a width of varieties. Person argues that the school is a school different for all. The aim is to problemize the school as “a school for all” by presenting a perspective that shows the patterns of
widths of varieties. The author argues that the pupils are different regarding background, opportunities, motivation etc and that the school treats them all in a single way: they have to go to school and they must be physically present. The school law (and all actors) also demands that the physical presence shall be transformed to mental presence. All in all, this leads to a dialectic meaning that if the school does not succeed in educating all, the pupils who offer resistance in different ways will give rise to a pressure of change directed towards the mode of working. A main concept is ‘(School) culture’ meaning a pattern of basic assumptions about and experiences of external adaptation and internal integration that by time have been valid within an organisation. The pupils are here given a central role because they are a link to the schools environment. External adaptation is to a great extent about regulating the schools relationship with pupils and parents. When handling external adaptation and internal integration, the school can focus on three aspects a) the compulsion to go to school, b) the system of credits and career plans or c) the desire for knowledge. Work is here regarded as something that is done in the sphere of necessity. The work of a teacher is a relational work, and is accomplished within an institution (that has the character of a total institution). The work of a teacher has a probation character and is in a tension between professional autonomy and economic control.

Teachers and ICT
In her thesis, Mia Karlsson (2003) takes ICT and as a new cultural tool for teachers as point of departure. The teachers’ use of ICT is here seen in relation to teachers’ team and to a Swedish National Action Programme, ITiS (Information Technologies in Schools). The aim is to understand how a teacher team functions as a vehicle for the development of competencies in pedagogical use of ICT. A main concept is ‘learning’, here regarded as something fundamentally social, involving appropriation of knowledge and the use of tools and is also situated in practice. Learning is a changing participation in a changing social practice. Another concept is ‘community of practice’. Practice is a property of a community and exists because people are engaged in actions and share a repertoire including for example routines, words, tools, ways of doing things, stories etc. the enterprise becomes joint by participants jointly negotiating it. ‘Meaning’ is something that is neither located inside us, nor out there somewhere, but exists in a dynamic relation in being a human being. A conclusion is that the organisation in teams is functional and that facilitators are important. A facilitator is a teacher educated within the ITiS Programme.

The multicultural society
The demographic situation in Sweden is changing from a fairly homogenous country to a country with an increasing proportion of immigrants. Pupils are entitled to mother tongue education if they have a mother and/or father with Swedish as a second language. It must be noted that mother tongue teachers form a very special category of teachers.

The aim of Berit Wigerfelt’s (2004) study is to illustrate some mother tongue teachers’ working conditions, and how they are related to work tasks and general problems described in a report from the National Board of Education. Mother tongue teachers must be able to teach from preschool level up to upper
secondary level and often at the same time. Study guidance related to core subjects and social contact work is included in their work tasks. Mother tongue education is voluntary and often not a natural part of the schools’ activity. The teachers often have to work in different schools and therefore they have an ambulatory working life. This is also a low status job. The way of organising for mother tongue education is different in the different municipalities. This study is from Rosengård in Malmö. Analytical concepts are not made explicit. The result is discussed under the following headings: ‘To work in a school’, ‘The native language teacher as bridging gaps’, ‘To feel one is needed’, ‘Not only a language teacher’, ‘To find an identity’, ‘To borrow rooms and to disturb’, ‘After school hours’, ‘Mixed classes’, ‘Twosubjects teacher’, ‘Competence development’ and ‘A changed attitude’. The result of the study points to structural problems.

Integration of teacher categories
The background of a study by Birgitta Davidsson (1999, 2002) is the Swedish curriculum for pre-school and compulsory school where it is stated that an integrated practice of the two traditions should complement each other in order to develop a new pedagogical practice. The aim is to identify conditions which support or restrain such a new integrated practice and to identify how teachers’ representations of the new practice change during a period of co-operation. A point of departure is ‘social representations’ (Moscovici), described as a socially developed and shared form of knowledge, a system of values, ideas and practices shared by members in a specific group, constructed, confirmed and developed through interaction among group members. Social representations establish a consensual order among phenomena and enable communication between group members by providing them with a code of exchange. It is about how people think about certain social phenomena and how the act in relation to this. An important concept is ‘integration’ meaning that negotiation and distribution are necessary ingredients in an integration of activities, and also agreements about how to organize the activity and why. ‘Negotiation’ is the process where the common new is shaped. The teachers’ negotiation about a joint practice is dependent on how integration is interpreted. A ‘contact’ makes distribution of work and responsibility visible. Davidsson concludes that notions about the child, each teacher’s professional knowledge about six- and seven year-old children and their development and educational practice (methods and instructional contents) are fundamental for the developed social representations of an integrated practice. The teachers’ educational mission is interpreted as creating a professional practice which gives space for common as well as separate worlds.

In her study, G Carlsson’s (1999) takes a life history approach and focuses on teachers’ knowledge. The aim is to elucidate how professional knowledge has grown and developed both in connection with the person’s life and experience and with the historical and societal context, including the history of reforms. A particular interest is directed towards cooperation between school and pre-school. The main concepts are ‘teacher knowledge’, regarded as complex knowledge developed by teachers in relation to their occupation, ‘arena’ meaning those pedagogical contexts where the teacher will be practising her/his teacher knowledge or use it in an authoritarian way, ‘repertoire’ meaning those
areas of complex occupational knowledge the teacher chooses to develop. The author argues that forms and ways of working with methods, individualising and pupil activating strategies constitute the knowledge of the two interviewed compulsory-school teachers. Knowledge of children, child psychology and psychology of learning constituted the knowledge of the two interviewed pre-school teachers.

In his policy ethnographic thesis, Jan Gustavsson (2003) has studied integration between formal school and child day care in relation to the curriculum guide of the compulsory school (Lpo 94). In particular he is interested in questions concerning social reproduction and social change. A conclusion is that local practices are characterised by both reproduction and change. The implementation of a curriculum is locally interpreted and applied but also locally negotiated and transformed. A suggestion is also that whilst agents are makers of local pedagogical identities, local educational activities, and local institutional histories they do make these under historical conditions that they have made themselves. But these historical, material conditions may not be shaped in the agents’ own interests and the agents are usually not in full control of them.

Teachers and the restructured school of the 1980’s and 1990’s
Daniel Kallós & Lisbeth Lundahl-Kallós (1994) have analysed inner work of schools related to reforms of the Swedish school system during the 1980’s and also related to changes that have occurred during the two years after that a conservative coalition came into power. The focus is on teachers within the 9-year compulsory school, how their conditions of work and their responsibilities have changed during this time period. They conclude the national common character of compulsory school is weakened.

The aim of the thesis by Kajsa Falkner (1997) is to understand the restructuring within the Swedish compulsory school during the 80s and the 90s. By ‘restructuring’ she means a significant change in the pattern of school governance. ‘Governance’ refers to norms and practices of decision-making: a) instructional methodology and curriculum, b) administrative management and organisation, and c) resources allocation. The encounter between the political intentions and the teachers’ conceptions is characterised by: a) ‘Room for acting’ – makes it possible for teachers to maintain their own way of training. The teachers are able to proceed with their work without interference from superiors. Room for acting also gives room for new ways of acting. b) ‘Lack of confidence’ – when the teachers accept the new proposals, they notice that their own knowledge is questioned. For example, the schools must be attractive on the market, an attractive image is more important than professional competence. c) ‘Subordination’ – teachers are expected to develop the schooling but consider such an initiative as demand from above. The teachers are expected to induce the parents to influence schooling but there are no real possibilities to realise the demands. d) ‘Alliances’ – with colleagues when negotiating resources and with the employer when negotiating the salaries. An alliance is regarded as a strategy for survival. Falkner argues that the Swedish school can be described in terms of proletarization. One argument for this is that in the policy texts teachers are described as executers, not as both initiators and executors.
Mikael Alexandersson (1999a, b) has reviewed assumptions behind expressions like reflective practice and school governed by objectives. The background is a new government strategy implying the interplay between the teachers’ theoretical knowledge and the activity’s practical shaping as a ground for an increasing reflective practice. He concludes that the teacher as a subject, by a strong rationality of responsibility and a conscious acting, is responsible for realisation of the school’s objectives. When responsibility is delegated or transferred, the indirect control is followed by harder control of the local school level (evaluation, quality control). However, those who formulate the objectives are not present and responsibility for the accomplishment of the objectives is not directly demanded from them. Politicians and administrators can be wordy on a governmental level, and there is an arena of actions where objectives and rules should be internalised, “owned” by the single teacher. This leads to a polarity between the different arenas and an uncertainty: who is the responsible party? Reflective practice is a complement to management by objectives and could easily become a rhetorical concept and together with management by objectives, a variant of control.

In her study, G Zackari (2001) describes and analyses changes in governance of education from the local school actor’s point of view. Narrative themes are: Power and powerlessness, political governing and conflict of goals, restricted choices – increased competition, economic management – the school as a market, the future and the equality.

Sverker Lindblad et al (2002) are analysing if and how changed social patterns of exclusion and inclusion in Sweden in the 1990’s are related to altered forms of educational governance. The focus is on how actors at different levels of the school system, including teachers, describe and understand these changes and relations, and how the successful student/young citizen is constructed by these actors and by young people themselves. The main concepts are educational restructuring, meaning an aspect of profound, but not disruptive or epochal, shifts in society and culture and social inclusion and exclusion.

Dennis Beach (2003) focuses on what was termed ‘a new school vision’ which here is a new discourse about professional freedom replacing steering by regulations in upper secondary school. The aim is to give a description of the way the discourse was reflected in practice in its local contexts in the view of the teachers, to identify key structural and referential aspects of difference in teachers’ views of education in relation to implications they see embedded for work in the vision, and to study what stands in the way of the realisation of social inclusion at the present educational moment. A key interest is ‘role contradictions’ and ‘erosions of professional self’. Teachers’ voices are formed between two competing value sets in the conceptualisation of professional understandings of good practise (traditional neo-fordist principles versus new post-fordist ones. Teachers may be subjected individuals in relation to these competing value formations, in the sense that their professional self-identity is being decentred from the reflexive self and being opposing discourses that cast professional identity between two extreme points of objectivity. There is a conflict between old values and a new vision, between old functions of selection and new educational ideas. Teacher voices are constituted between competing
regimes of truth and concern a continual struggle over definition rights in the curriculum over what counts as valid teacher work and correct ways of approaching current curriculum ideas and new policy.

In her thesis, Marianne Dovermark (2004) studies the rhetoric about the restructured school, how the image of school, education and its claims look like, are talked about and materialised by pupils, teachers and school managers. The background is that international economic organisations (such as OECD, EU, GATT) stress the importance of education. Education is part of global policy paradigm named restructuring. The educational system is seen through a lens that takes a global knowledge society as a point of departure. ‘Restructuring’ is here related to changes of the state with deregulation of state financed activities and thereby a following reduction of the welfare state. The main concepts are ‘habitus’, - defined as the ability to percept latent possibilities and value the world an individual lives in, a product of objective, material assets and determined by class but also a cultural phenomena, ‘field’ – a structured system of social positions and can be occupied by individuals or institutions, its nature determines conditions for the possessors, and ‘capital’ which can be symbolic and cultural (Bourdieu).

Teachers and the new salary setting
The study by Dan Collberg & Haukor Viggósson (2004) is about individual salary setting and consequences for the school managers’ (head masters’) pedagogical leadership. The study is reported as a pilot study. The author argues that the transfer from the state to the municipalities as responsible authorities did not change the power of the school manager. However, the new individual salary setting from 1996 was a tool that gave her/him power and authority. The salary setting was expected to function as an incentive for school developmental work. A main concept is nearness which can be a) physical (related to geographical distance between school manager and teacher), and b) psycho-social (the school managers way of approaching the teachers and how the manager succeeds in making the teachers experience nearness).
Chapter 4

Research Review on Restructuring of Education and Health Care Institutions in Greece: the Social Construction of Teaching and Nursing

Evie Zambeta, Yannis Skalkidis, Dimitra Thoma, Areti Stavropoulou, Nasia Dakopoulou

Introduction: Polity and Welfare in Greece

The aim of this report is to provide a state of the art research review on restructuring of education and health care institutions and the social implications for the teaching and nursing professions in the Greek context. Therefore our task is to specify and analyse the interconnections between wider socio-economic and political change and the social construction of the teaching and nursing profession and especially the ways research understands the professional positions and experiences of teachers and nurses and their implications for practical professional knowledge. Professional teaching and nursing are conceptualised as key agents of the welfare state which mediate between the state and the citizens and in these terms constitute critical gate-keepers in the welfare provision.

If we were to follow Esping-Andersen’s typology of welfare regimes, Greece would be classified as a conservative type of welfare state, although such a typology refers to developed welfare societies and not to southern European states, certainly not to states such as Portugal or Greece (Stassinopoulou 1996:220). The subsidiary element is an eminent characteristic of the Greek welfare state. Traditional institutions such as the family and kinship or clientelist networks that facilitate multilevel dependencies of the citizen from the state and the public officials are enduring features of Greek society. It is argued (Charalambis 1996) that these non-transparent networks develop a peculiar type of social consensus based on non-institutionalised modes of social transaction. This process of achieving social consensus, which has its origins in the 19th century Greek political system, but persists till today, undermines the development of a transparent public sphere and the construction of welfare state institutions and policies. A peculiar type of ‘corporate clientelism’ is considered to be a mode of political networking and a form of mediation of organised interests between the state and civil society which consists an integral component of the political system in the third Greek republic (1974 onwards) (Lyrintzis, et al. 1996). However, the type of political mediation of interests in the Greek political system, especially with regard to the element of rationality of political action, remains an open issue of academic inquiry (Gravaris 2002).

After the restoration of democracy, in 1974, starts a period of welfare state expansion and democratisation in the political system and public institutions. This process is continued in the eighties when Greece becomes an EU member
state. During the nineties Europeanisation processes and the openness of the country to global competition diminish the field of domestic policy choice (Esping-Andersen 1996). At the same time the substantial decline of the birth rate and ageing of the population becomes a central problem that contributes to the fiscal crisis of the Greek welfare state. Moreover, the global dominance of the neoliberal agenda and the redefinition of social democracy through the ‘Third Way’ policies have led to a retreat of welfare state in Greece. In the mid-nineties the Greek state’s public expenditure on welfare provision is the lowest among the EU member states after Ireland (Cochrane, et al. 2001:264). By the end of the decade the inequality ratio in Greece is 6.2, the highest in the EU of the 15 member states after Portugal (Taylor-Gooby 2004:214). In the field of Education policy the emergence of an entrepreneurial culture and the generalisation of a highly competitive system of assessment represent the attempt at modernisation and one of the ways globalisation trends are inscribed and negotiated in Greek society (Zambeta 2002a).

Generally speaking the post-war structuring of the Greek welfare system could be analysed with regard to the following periods:

a. post-war period (1945-1967), civil war (1946-1949), civil and social rights under question
b. dictatorship (1967-1974)
d. welfare state restructuring (1990 onwards)

This paper comprises of two major parts. The first part reviews the research related to the teaching profession, whereas the second part examines the research related to professional nursing. The paper concludes with some cross-professional reflection on research views of the two key welfare state professions.

Methodological clarifications
This paper reviews research that is relevant to the conceptualisation of education and health as welfare state institutions and to professional teaching and nursing. The periodisation of research corresponds to the main stages of welfare state development in the country. The attempt of this presentation is to identify the key themes addressed in the research agenda in each particular period. A methodological clarification that should be made here refers to the definition of what is considered as being research. Research here is not confined to either strictly empirical work or funded research. Research is perceived in wider terms and includes theoretical studies, texts of academic value, such as post-graduate and doctoral dissertations, articles in reviewed journals and books which contribute to understanding the Greek educational and Health Care context. Doctoral theses that have been submitted to Greek and other universities have been particularly examined as well as publications in books and refereed journals.
The Social Construction of Teaching

Historical background: contextualisation of teaching and professional knowledge
The Greek education system has been considered as being systematized, geographically expanded and democratized relatively early in comparison to many of its European counterparts (Tsoukalas 1982). Indeed the provision of public and free of charge compulsory education for all has been introduced in 1834, much earlier than in other more industrialized states or more democratized regimes in terms of civic and political rights. The early expansion of education institutions, however, does not entail the actual implementation of compulsory education or the dissemination of literacy in rural and deprived areas. Drop out rates and functional illiteracy, particularly in geographically remote areas, among the poor and among women, remained high till the WWII, the sixties and even the seventies.

The turbulent political life of the country, involving civil war (1946-1949) and a dictatorship (1967-1974), is reflected in education policy and to what has been defined as “the reform that never took place” (Dimaras 1987-1988). A continuous conflict with regard to educational objectives among conservatives, modernizers and left-wing intellectuals has actually prevented any attempt at democratisation and modernisation of Greek education for many decades during the best part of twentieth century (Frangoudaki 2001). The first education reform, aiming at the expansion of educational institutions and democratisation of education was that of 1976, initiated by a right-wing government (New Democracy) (Eliou 1978; Kazamias 1978; Kontogiannopoulou - Polydorides 1978). The process of democratisation and expansion of educational institutions has been continued during the eighties, by the social-democratic party (PASOK) (Zambeta 1994; Zambeta 2004).

The construction of the teaching profession has been a crucial component of state education building in Greece since the early nineteenth century. The control of teacher identity in particular has been a basic strategy for political surveillance accomplished through the education system (Zambeta 2002b).

The teaching profession in Greece has been constructed as a public service. In spite of the fact that initially, according to the 1834 Education Act, primary schools were established at the local government level, the teachers were public servants supervised by state commissionaires and subjected to the control of a structured bureaucratic hierarchy, which was accountable to the central state (Dimaras 1987-1988). This continues to be the case till the present times. The state maintains the overall control in the accreditation and recruitment of teachers working in the public sector of schooling, while the Ministry of National Education and Religions (MNER) sets the legal framework and controls teachers’ appointment, in-service training, professional development and intra-professional mobility. At the same time, the MNER controls the
content of teachers’ work through the central control of the national curriculum, students’ and teacher’s textbooks. Teacher’s textbooks, in particular, offer detailed guidelines regarding the educational objectives, implementation of each curriculum subject and school textbook as well as criteria for student assessment. This policy genuinely undermines teachers’ creativity or professionalism and scrutinises professional practices.

Initial education in professional teaching in Greece is divided into two major categories. Secondary teachers’ (kathigites) initial education has always been provided at University level with 4 years minimum duration of studies. This education is discipline oriented in a way which corresponds to the division of labour between university departments. This means that secondary teachers actually study one particular subject, such as Linguistics, Modern Greek or Ancient Greek Literature, Mathematics, Geology, Sociology etc. However, within the profession secondary teachers are defined by specialisation which roughly corresponds to the variety of the different curricular subjects. A pre-modern category defined as ‘philology’ corresponds to a wide spectrum of disciplines covering Greek Language (both modern and ancient), Latin, Linguistics, Literature, History, Archaeology and Philosophy. Graduates of any of these university departments are defined as ‘philologists’ and can practically teach in all these areas. Accordingly, graduates of any department falling into the broad category of ‘natural sciences’ can teach Physics, Chemistry, Geology, Geography, Biology or Natural History. On the other hand, in most of the cases, secondary teachers’ initial studies do not involve any subjects related to education and they receive no teaching experience and practice during their course of studies. As a consequence, secondary teachers’ codified ‘professional knowledge’ acquired through initial education cannot be considered as providing competence with regard to their ‘professional positions’. In fact the system reflects a traditionalist and encyclopaedic approach to education, which despecialises education professionals.

While secondary teachers’ education has always been provided in a context of university academic autonomy, the primary teachers’ (daskaloi) initial education used to be state-controlled and at a non-university level. Until 1985 the Pedagogical Academies were the primary teachers’ and Kindergarten teachers’ training institutions providing for a two years post-secondary education. This segregation within the teaching profession was reflecting the elitist nature attributed to secondary education in the nineteenth century, which was confined to the bourgeoisie and thus allowed critical inquiry. Primary education, by contrast, was considered as the education of the populace which mainly performed social control activities, an approach followed in other parts of Europe as well (Vaughan and Archer 1971). Discipline and authoritarian governance ruled in the Pedagogical Academies, the quality of education was poor, the curriculum and text-books were state-controlled, while the official knowledge excluded critical reflection and research (Zambeta 1994). Since 1985 the Pedagogical Academies have been abolished and the primary teachers study at universities for 4 years. Although the content of studies varies among the different university Departments which educate teachers (the Departments of Primary Education), the general trend is that a substantial part of the respective courses refers to education (including Pedagogy, Psychology and Sociology of
Education), another part refers to the school curriculum subjects (Language, Mathematics, Physics etc.) while a third part refers to classroom experience and teaching practice (Stamelos 1999). The upgrading of primary teachers’ education has transformed internal hierarchies in teaching; it had considerable consequences in the sociology of the teaching profession, as well as in the social position of teachers. It was a policy reflecting modernisation of the means of political surveillance as well as the effects of globalisation and Europeanisation processes in the Greek educational system (Zambeta 2002b).

### Periodicities: Political and Educational Change

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Restructuring
Europeanisation
Globalising effects
Immigration flows

- Assessment as modernisation and quality assurance
- the Lyceum as the gate-keeper of Higher Education
- Entrepreneurial culture
- Further expansion of phrontistiria
- academic autonomy in teacher education
- Recruitment through state-controlled national examinations
- Assessment of performance / lack of consensus
- devaluation of teaching in the public schools

| Ideal teacher: the performative and effective teacher |

Table I presents the main policies followed in Greek education since the WWI. It attempts to categorise these policies with regard to the major periods that reflect substantial shifts in the citizens-state relationship and in the construction of the welfare state. Moreover it attempts to specify the main policy trends affecting the teaching profession in each particular period. Four main periods are identified.

a. In the 1945-1967 post-war period education policy reflects the civil war political climate where education institutions and teachers are scrutinised.
b. The 1967-1974 period of the dictatorship reflects the lack of political legitimacy at any level of social life, as well as the intensification of political control in education.
c. The 1974-1989 period is the most fruitful in terms of the development of the education welfare state and the democratisation and modernisation of the education system and professional teaching. Europeanisation starts being a variable of education policy.
d. In the period of the 1990’s onwards education policy reflects the redefinition of welfare state and the effect of globalisation and Europeanisation processes.

Main trends in educational research: the social construction of the teacher and professional knowledge

Demographics related to the teaching profession

Unemployment rate
The wider expansion of the educational sector since the 1960’s has obviously affected the teaching profession. There has been an explosion in the numbers of teachers in all three education levels who in 1960 numbered 34,187, while in 2002 were 149,516 (Varnava - Skoura, et al. 1993). Nevertheless the decrease in birth rate accompanied by the mass production of new qualified teachers has led to high unemployment rate and job uncertainty among the graduated young teachers. Unemployment rate remains high and increases, especially among secondary education qualified teachers. In 1994 the number of secondary teachers awaiting recruitment was 74,340 (Kazamias 1995). In 2002 the number of secondary teachers awaiting for recruitment was 100,205 (YPEPTH, quoted in: (ERC 2004). In Primary Education unemployment rate decreases rapidly.
Ageing
A side effect of unemployment among younger teachers is the shift in the age distribution within the profession during the nineties. The age distribution of primary teachers (public and private) in 1991/92 and 1999/2000 is characterised by a shift of the distribution maximum from ages younger than 30 years old (in 1991/92) to ages between 31-35 years old (in 1999/2000) (ERC 2004).

Gentrification
On the other hand the teaching profession is increasingly feminised. This is particularly the case in Primary and Lower Secondary education, whereas women teachers continue being less than their male counterparts in Technical and Vocational education, a fact reflecting the under-representation of women among the related disciplines. Nevertheless, female graduates of technical subjects, such as Engineering, are more likely to be directed to the teaching profession than their male colleagues, a fact interpreted as a social selection taking place in the labour market which is unfavourable to women in the respective professions (Kontogiannopoulou-Polydorides and Zambeta 1997). The same study shows the under-representation of women in the educational hierarchy and management posts, even in subject areas where women constitute the overwhelming majority of the teachers’ population, such as in humanities.

Increase of the private sector of teaching
Phrontistiria are private institutions, parallel to the school system, aiming at preparing pupils for exams. Phrontistiria consist an enduring and increasing part of private tuition in the Greek educational context which presents a dramatic expansion in the recent years. According to the available data 54% of students attended Phrontistiria in 1984 while in 1993 this percentage increased in 65% (Kassotakis 1995).
At the same time there is a steady increase of the private sector of schooling (http://www.eurydice.org) since many parents tend to prefer it to the public school system.

Change of student population
Globalisation impacts have been evident in Greek education since the 1980’s. Perhaps the most crucial one has been the dramatic change in the student population. While on one hand there is a steady decline in birth rate among the native population, a trend observed in most of the EU countries, (http://www.overpopulation.com/faq/basic_information/birth_rates/europe.html), there is an increase of the actual country’s population due to the arrival of large numbers of economic immigrants, from central Asia and the Far East and especially from Eastern European countries. Immigration flows have gradually transformed the composition of student population, as the new incomers tend to settle in the country and either move the whole family or create families in Greece. Many of these immigrants have entered the country with no legal documentation that would allow permanent stay, social rights to work and welfare provision. Although the Greek state has been reluctant in putting forward legalisation processes, in the last five years many immigrants have acquired legal status. The rapid increase in the numbers of immigrant students is presented below. According to the MNER available data, 8,9% of the overall
student population were foreign students in the school year 2002/03. In general, the percentage distribution of foreign and repatriated students in the educational levels are: Pre-school: 8.1%, Primary: 10.6%, Lower secondary: 10.2%, Upper secondary: 5.1%.

**Periodisation of research on professional teaching**

**Post-war period 1945-1967**
Educational discourse in the post-war period is largely influenced by the wider political and socio-economic climate of the respected period. The official education policy discourse places particular emphasis on the ideological role of the teachers as key parameters for the construction of national identity, a fact strongly related to the cold war atmosphere (anti-left political discourse) and the civil war memories. The 1964 reform episode, which was an attempt at modernisation of Greek education, has been overthrown, following the wider political trajectory of the country.

During this period teachers are viewed as ‘missionaries’, for moulding children’s character. Emphasis is placed on the pedagogical and moralistic dimension of education and teaching. More specifically, Papanoutsos, the main figure who proposed the 1964 educational reform, in his book published later under the title ‘*Paideia: Our great problem*’ discusses the issues of the humanist dimension of Democracy (Papanoutsos 1976). He focuses on the moral standards of Democracy, students’ political education and the studies of Ancient Greek authors. He also offers series of advices to teachers concerning issues of their daily professional life such as: the meaning of learning, the meaning of punishment, rigidity or leniency.

**Dictatorship 1967-1974**
Education is constructed as the basis of the ideological scheme of “Hellenic-Christian” civilization and of cold-war premises. Education policy aims at the ideological and political control of teachers. The so called ‘certificate of social conviction’ indicating the social and political preferences of the teacher becomes a prerequisite for guaranteeing a placement in the public sector. During this period educational research discourse is either censored or silenced. Some studies follow conservative approaches emphasizing the pedagogical aspects and socializing process of teaching and schooling (Frangos 1984; Markantonis 1967; Markantonis 1969; Paraskevopoulos 1974). Paraskevopoulos and Markantonis focus on issues of Pedagogy and Psychology in the educational context, such as Psychology of individual differences and pupils’ psychological development.

The period of restoration of democracy is accompanied by a gradual development in the field educational research and policy. The main trends in educational research are the following.
• **Institutions and policies**
  Eliou analyses the 1976 education reform and reveals the silences of education policy, especially with regard to socio-economically deprived groups (Eliou 1978).
  Kazamias examines the politics of the 1976 educational reform from a historical comparative perspective (Kazamias 1978).
  Kontogiannopoulou-Polydorides analyses the social implications of the 1976 education reform regarding social selection in the process for higher education students recruitment (Kontogiannopoulou - Polydorides 1978).
  Dimaras analyses the enduring features of education reform process in Greece from a historical perspective. He constructs the argument about ‘the reform that never took place’ at an attempt to interpret the suspension of education modernisation in Greek society (Dimaras 1987-1988).

• **Pedagogical aspects of teaching**
  Frangos focuses on issues of teenagers’ development, personality and school adaptation, psychological theories of learning and teaching problems (Frangos 1984).

• **Sociological aspects of education and social inequalities**
  A series of studies in the above period place particular emphasis in the relationship between education and the reproduction of social inequalities. A number of Marxist approaches focusing on the social role of education view teachers as agents of a state apparatus contributing to social reproduction.
  Milios makes a critique of the capitalist education system and focuses on the relationship between the educational apparatus and the capitalist state power (Milios 1981).
  Eliou focuses on educational opportunities, illiteracy, social exclusion, students’ drop-out and gender issues in education (Eliou 1984).
  Gotovos, Mavrogiorgos and Papakonstantinou are engaged with issues of teachers’ education, critical pedagogy and professional knowledge (Gotovos 1984).
  Frangoudaki presents to the Greek readership the major international studies and theories of sociology of education concerning issues such as education and economic development and social inequalities in education. She also analyses the social selection processes in Greek education through the numerus clausus and the role of the examinations which regulate access to universities (Frangoudaki 1985).

• **Sociology of the teaching profession**
  A substantial number of research studies focus on socio-economic background and the social status of teachers. More specifically:
  Dimitriadou discusses teachers’ criteria for choosing their profession. She argues that the main criteria are: a. the contribution to the intellectual and moral development of students, b. the acquisition of helpful experiences for the bringing up of their children and c. the professions’ social esteem (Dimitriadou 1982). She argues that primary and secondary school teachers, tend to use idealistic values for choosing their profession.
Papanaoum-Tzika studies teachers’ work from the students’ point of view (Papanaoum-Tzika 1984).

Xochellis conducts a survey which presents the self interpretation of the role and attitudes of Greek educators, particularly those engaged at the level of secondary education (Xochellis 1984). Another study focuses on the crisis of the Greek education and teachers’ training (Xochellis 1989).

- **Teacher’s socialization**
  During this period there is a strong public debate with regard to teachers’ initial education and training. Several articles focus on teachers’ education, but there is no substantial research on this issue. Flouris presents teachers’ training system in the United States and makes suggestions for the Greek case (Flouris 1981). Mitropoulos suggests a system for educating teachers based mainly on their individual training needs (Mitropoulos 1981). Papakonstantinou presents the history of teachers’ training systems from 1829-1933 and the socially selective character of the Greek education system after the second world war up to the education reform of 1976 (Papakonstantinou 1991).

**Welfare state restructuring 1990-2005**
Since the nineties there is an explosion in the field of educational studies and research.

- **Institutions and policies**
  Andreou and Papakonstantinou study the organisational structure of the educational system, placing particular emphasis on the administration and the role of the inspectorate from the nineteenth century up to the present. They analyse the system through the concept of bureaucracy and control (Andreou and Papakonstandinou 1994).
  Bouzakis makes a historical study regarding the educational reforms in Greece accompanied by documentary support material (Bouzakis 1994 & 1995).
  Zambeta analyses the main education policies adopted in primary education in the 1974-1989 period and their implication for the welfare state. The study focuses in particular on education accountability and professional autonomy (Zambeta 1994).
  Kontogiannopoulou-Polydorides makes a sociological analysis of the relationship between educational institutions and policies and the quest for equality of opportunities (Kontogiannopoulou-Polydorides 1995).
  Kazamias and Roussakis analyse the process of education reform from a historical comparative perspective, while they place particular emphasis on the latest policies followed in the decade of the nineties (Kazamias and Roussakis 1999).

- **Globalisation and Europeanisation**
  Roussakis analyses the concept as well as the political perspectives of European citizenship and the challenges it entails for the national educational systems (Roussakis 1995).
  Petronikolos discusses the same issue by placing particular emphasis on the analysis of modern Greek identity (Petronikolos 2003).
  Moutsios attempts to analyse the emergence of European pedagogic identities and cultures (Moutsios 2003).
Grollios attempts a critical analysis of the European Union education policy discourse (Grollios 1999).

Zambeta examines the process of Europeanisation in Greek education. It is argued the emergence of an entrepreneurial culture is one of the main features indicating the specific appropriation of European and global education trends in the Greek educational context (Zambeta 2002a).

Kazamias examines the implications of globalisation in the humanistic concept of paedeia and the risks following an instrumental rationality and a market orientated education policy (Kazamias 2003).

Pantidis and Passias analyse the social meaning of Europe and the concept of Europeanisation as this is expressed in the public discourse and in education policy. They particularly focus in the concept of ‘the European dimension in Education’ (Pantidis and Passias 2003).

Stamelos and Vassilopoulos present the education policy of the European Union and discuss the implications for national education systems, by placing particular emphasis on the Greek case (Stamelos and Vassilopoulos 2004).

Coulby and Zambeta analyse education institutions as the battleground of globalisation on one hand and nationalism on the other. It is argued that while globalisation becomes a driving force in education systems, it is nevertheless negotiated with embedded elements in each particular context and it is challenged by tradition and nationalism (Coulby and Zambeta 2005).

**Issues of professional development**

Pirgiotakis presents the history of the development of the teaching profession in the Greek society since the nineteenth century. He characteristically defines it as the “odyssey” of the teaching profession (Pirgiotakis 1992).

Dedouli locates and discusses the issue of teacher’s professional development within the context of teachers’ personal development (Dedouli 1998).

Dakopoulou focuses upon the professional development of primary teachers. The study seeks to throw light on their relevant experiences, preferences and perceptions. The major findings reveal that traditional courses centrally provided do not meet the needs of the participants and hinder their development. The study explores the major constraints and limitations, both structural and cultural of moving towards innovative approaches to teachers’ development in the highly centralised educational system of Greece (Dakopoulou 1999).

**Gentrification of the teaching profession**

Several research projects emphasize gender representation in various categories of the profession and within the professional hierarchy.

Vassilou-Papageorgiou focuses on the gender dimension of the educational personnel in primary education and raises issues of feminisation of the teaching profession (Vassilou-Papageorgiou 1995).

Kontogiannopoulou-Polydorides and Zambeta focus on gender distribution in the various specialisations of the teaching profession and the representation of female teachers in the professional hierarchy and managerial posts (Kontogiannopoulou-Polydorides and Zambeta 1997).

Maragoudaki examines the perceptions of gender in the kindergartens’ textbooks (Maragoudaki 2000).
• Teachers’ evaluation, assessment and control as against professionalisation
Mavrogiorgos focuses on issues of students’ assessment and teachers’ evaluation. He understands the evaluation process of teachers as a process of control over teaching (Mavrogiorgos 1992; Mavrogiorgos 1993). Papakonstantinou analyses teachers’ work and the teachers’ claim on ‘pedagogical knowledge’. He argues that evaluation in education not only reproduces existing social hierarchies but it undermines teachers’ autonomy regarding the control of professional knowledge as well (Papakonstandinou 1993).

• Issues of restructuring, teachers’ proletarianisation and teachers’ unionism
Mavrogiorgos argues that teaching is a labour process related to the social function of education, the reproduction of social relations (Mavrogiorgos 1992). Kazamias focused on the working conditions of secondary teachers as well as on the effectiveness of their initial training (Kazamias 1995). Vassilou-Papageorgiou presents the history of teachers’ unionism and stresses its interventions in the educational matters with particular reference to the 1976 education reform (Vassilou-Papageorgiou 1996). Patramanis explores the changes in the appointment system of teachers in Greece, namely, the transition from ‘epetirida’ (appointment list) to competition and the implications. It is argued that despite the rhetoric of the official discourse, this change does not intend to upgrade the quality of educational provision in Greece and/or to solve the problem of teachers’ unemployment (Patramanis 1999). Pigiaki focuses on the educational discourse of secondary teachers’ union (OLME) in the period 1993-1997, after teachers’ two months strike in 1997 (Pigiaki 2000). Thoma addressed the issue of autonomy and control over teachers’ labour process, in upper secondary education. The focus of the study is teachers’ labour process as this structured by the introduction of prescribed and standardized curricula. The theoretical framework is a critical approach to the labour process theory and its proletarianisation thesis (Thoma 2004). (Dimou 1999) studied the attitudes of students, parents and teachers towards phrontistiria, the parallel system of private tuition courses.

• Teachers’ identity
A large number of recent research projects address issues of the construction of the professional self and cultural identity. Kaila presents teachers’ and undergraduate students’ attitudes towards the content and the meaning of the professional role (Kaila 1993). Frangoudaki and Dragonas focus on the role of school textbooks in the construction of national identity. They argue that the national identity which is shaped by the education system is fragile, contradictory and undervalued (Frangoudaki and Dragonas 1997). Giannakaki studied the way teachers construct their professional identities. She argues that though teachers, in secondary education, experience constraints and control over their work processes cannot be seen as passive recipients—“puppets” of the System (Giannakaki 1997).
• **Teachers’ initial and further education**
  Makrynioti and Solomon discuss the conceptualisation of initial teacher education in the relevant university departments and examine the place of social sciences in their structure (Makrynioti and Solomon 1991). Bouzakis, Tzikas and Anthopoulos present the history of the training of primary and kindergarten teachers from 1834 onwards (Bouzakis, et al. 1996; Bouzakis, et al. 1998).
  Stamatos examines the implications of the 1985 reform regarding primary teachers’ education and the formation of the various types of university curricula in the departments which educate teachers (Stamelos 1999).
  Zambeta examines the social meaning of the change in modes of surveillance, after the abolition of the state controlled system of initial teacher training and the establishment of university based teachers’ education (Zambeta 2002b).
  Dakopoulou attempts to trace, describe and analyze the process of restructuring of education policy regarding the Teacher Training Centers-Didaskalia Dimotikis Ekpedefsis (DDE), which has a rich and long history of institutional variations, by inquiring in particular the structural change they underwent between 1995-2003. The major findings of the study reveal the multidimensional trajectories at the global, regional and local level that facilitated the formulation of the examined education policy (Dakopoulou 2004).

• **Sociology of the teaching profession**
  Askouni and Androusou (1998) examine the way early childhood education teachers perceive and understand pupils’ differences regarding language, nationality, gender and social characteristics.
  Friderikou studies the representations of gender in the language textbooks of primary education (Friderikou 1991).
  Dimitropoulos addresses the issue of job satisfaction. The study identifies a. the personal satisfaction related to the teacher’s social mission, b. long vacations, c. the sense of autonomy during work practice, d. social recognition, e. the social status of the profession (Dimitropoulos 1998).
  Hopf and Xochellis focused on the way teachers approach teaching as a process and not as a product. The study focuses on the way teachers define teaching objectives and the way they plan their teaching (Hopf and Xochellis 2003).
  Papanaoum studied teachers’ perceptions regarding job satisfaction and effectiveness of their work. According to the findings teachers think that they are, to a large extent, responsible for the school’s effectiveness. Additionally, the majority of teachers are reported as been satisfied by their job (Papanaoum - Tzika 2003).

• **Implications of ICTs in learning and teaching**
  Kynigos was responsible for the OECD’s research project: “Schooling for Tomorrow: Information and Communication Technology and the Quality of Learning” (1998-2001). According to the findings, a change in teachers’ perceptions and attitudes towards new technologies is a pressuposition, if we are to take full advantage of the ICT in learning (Kynigos).
  Svolopoulos undertook a study concerning the assessment of the impacts of computers’ use. The research findings suggest that the use of computers improved the quality of teaching (Svolopoulos).
• **Social discrimination, multiculturalism and teaching**
  Androusou, Askouni, Magos and Chrystidou-Lionaraki present the theoretical discussion regarding cultural diversity and interculturalism in education (Androusou, *et al.* 2001)

Gotovos argues that the Intercultural Pedagogy can effectively contribute to the understanding of the new educational reality which is *characterised* by what is defined as “otherness” (Gotovos 2002).

Zambeta, in a survey addressed to gate-keepers in key welfare institutions, examines the social attitudes of teachers towards economic immigrants. The study concludes that the teachers’ perceptions and attitudes reflect the wider xenophobic position expressed in the mass-media and general political discourse. Teachers, however, tend to be more willing to follow inclusive strategies than the employees in the wider public sector, a fact associated to an organisational logic of the educational institutions (Zambeta 2003a).

Another study examines education policy regarding religion and religious diversity in Europe and the socio-political and educational implications of the lack of secularism in the Greek educational system. The same study focuses on the education practices with regard to students coming from the Muslim minority and study throughout Greece (Zambeta 2003b).

Dragonas discusses from a social-psychology approach the dynamics of identity and the conditions and policies for inclusion of the Muslim minority students who study in minority schools in the province of Thrace (Dragonas 2004)

• **Education and social selection, social inclusion and exclusion**

Kontogiannopoulou-Polydorides studies socio-economic aspects of discrimination in education especially with regard to the social role of the general admission examinations that regulate access to higher education (Kontogiannopoulou-Polydorides 1995, 1996). Kyridis studies the same issue in a historical perspective (Kyridis 1997).

Kaila and Theodoropoulou studied teachers’ representations and attitudes on students’ school failure and students with special needs (Kaila and Theodoropoulou 1999).

Kazamias, Zambeta and Karadjia study the implications of the changing modes of education governance in the construction of education subjects and in social inclusion and exclusion (Kazamias, *et al.* 2002).

• **Occupational stress, working conditions, teachers’ burnout.**

Kantas focused on professional satisfaction of teachers in secondary education. He argues that the main sources of professional satisfaction are the content of the job itself, as well as the network of the interpersonal relations within the job environment (Kantas 1992).

Argyropoulou discusses the sources of and makes some suggestions for managing teachers’ stress. (Argyropoulou 1999)

Vlachopoulos addresses the issue of teachers’ burnout. One of the major finding of the study is that the burnout syndrome is generally adding up, while the vacations may suspend its excessive gathering (Vlachopoulos 1999).

Kourtesi investigated teachers’ strategies for managing occupational stress. She found that women get support from their social environment. Teachers in
primary education are more interested in reorganizing their job in comparison with teachers in secondary education (Kourtesi 2000).

Leontari et al studied the occupational stress of teachers in primary education. It was found that only a relatively small percentage of teachers stated that they experience high levels of stress. Additionally, female teachers reported higher levels of stress and so did teachers working in rural areas (Leontari 2000).

Koustelios & Kousteliou examine the perceived level of burnout of Greek teachers and attempt to predict burnout of Greek teachers by using as predictors the different aspects of job satisfaction (Koustelios 2001).

Aventisian-Pagoropoulou (2002) examined the burnout syndrome in a sample of 411 teachers who work in public and private schools in Athens. It was found that teachers having graduated from the 2-year Teachers Training Colleges (Pedagogical Academies) had higher scores on emotional exhaustion in comparison with teachers who have graduated from 4-year teacher training program (university Departments of Education) (Aventisian-Pagoropoulou 2002).

Koutouzis conducted a study concerning the institution of supply teachers, their professional career and their working conditions (Koutouzis).

- **Discipline and knowledge**

  Kouzelis and Solomon examine school knowledge as a form of discipline and governance of the social subjects, attempting a dialogue between Foucault’s approach of discipline, the Frankfurt School of Critical Theory and Bernstein’s conceptualisation of school pedagogy and knowledge (Kouzelis 1994; Solomon 1994). From a micro-sociological point of view, Makrynioti discusses the issue of order within the classroom based on the principles of symbolic interactionism (Makrynioti 1994).

  (Matsagouras 1999) examines the construction of teachers’ knowledge and the presuppositions for the formation of what he defines as the ‘reflective’ teacher, a teacher who remains critical, creative and responsive to students and social reality.
The Social Construction of Nursing

**Historical background of nurse education in Greece**

This section attempts to describe the status of nursing education in Greece. Firstly, it presents the various levels and institutions of nurse education. Secondly, the educational developments in nursing since 1875 will be highlighted with specific reference to Universities and Technological Educational Institutions (T.E.I.).

**The Nurse Training Institutions**

One major characteristic of nurses’ education in Greece is the variation of nursing training institutions and the multiple levels of education. This feature provides to the profession its idiosyncratic character and explains the variation in nursing social status and practice.

The multiple levels of nurse education indicate the different perceptions about nursing. Up to the present, the nursing profession had no authority to influence political decisions affecting the profession, since there was no common professional policy about nurse education. It is important to mention that up to now there was not an autonomous professional body/union, responsible for planning and implementing a common policy for the nursing profession. It was only recently, in 2004, that the first autonomous professional body/union for nursing was established and its first official conference took place in February 2005, in Athens [Hellenic Nurse Association, Law 3252/2004].

**Institutions and levels of Nurse Education**

<table>
<thead>
<tr>
<th>Educational Institute</th>
<th>Years of training</th>
<th>Degree/title</th>
</tr>
</thead>
<tbody>
<tr>
<td>University</td>
<td>4</td>
<td>Degree in Nursing Registered nurses (RN)</td>
</tr>
<tr>
<td>Technological Educational Institutions (T.E.I.)</td>
<td>4</td>
<td>Degree in Nursing Registered nurses</td>
</tr>
<tr>
<td>Military Nursing School</td>
<td>4</td>
<td>Degree in Nursing Registered nurses, practising only in army health services</td>
</tr>
<tr>
<td>Institutes of Vocational post-secondary education (IEK)</td>
<td>2</td>
<td>Diploma/Nurse assistants</td>
</tr>
<tr>
<td>(public/private)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEE (Technical Vocational Secondary Schools) secondary education – based at schools and hospitals</td>
<td>2</td>
<td>Diploma/Nurse assistants</td>
</tr>
</tbody>
</table>
The above table presents the multilevel and multi-institutional character of nurse education in Greece. Registered nurses are 4 years graduates at higher education level. There are discrepancies though even among the considered as registered nurses. There are four levels of nurses: a. University level education graduates (4 years), b. Higher Technological Education graduates (4 years), c. post-secondary vocational schools graduates (2 years on the job training), d. Secondary education graduates who have received a two years vocational education on nursing. However, only two categories of nurses responsible for general care are considered as qualified registered nurses: the graduates of the University of Athens, Faculty of Nursing, and the graduates of the Technological Educational Institutions (T.E.I.), Faculty of Health and Caring Professions, Department of Nursing (Stavropoulou 1998). The graduates of Military Nursing Schools are considered also as registered nurses, but they are entitled to practice exclusively in army services. The graduates from IEK and TEE are nurse assistants, responsible only for assisting nursing work. The following sections will focus on the two main categories of nurse graduates (the University and the T.E.I. graduates) who are the main Health Care providers in the National Health Care System.

The Dual System of Education in Qualified Professional Nursing in General Health Care

Qualified professional nursing status in general Health Care is currently provided through a dual system of initial education: in Universities and in TEIs (non-university higher education sector). Nursing education is an indicative example of the transitions taking place in tertiary education in Europe.

Since 1875 and up to 1970 all nursing training was hospital based, under the Ministry of Health. The law of 1970 (Law 652/1970) established the Centre for Higher Technical Education under the Ministry of Education. There were five such schools comprising of departments of nursing operational since 1970 (Papamikrouli 1993). Discussions and continuous lack of consensus regarding the status of higher technical and vocational education in Greece have led to subsequent changes in the name and institutional framework of the above Schools. After the 1974 restoration of democracy, a reform law introduced in 1977 (Law 576/1977) renamed these Centres into Higher Technical and Professional Education Centres (KATEE), without actually influencing the structure of the institutions. Finally, the reform law of 1983 (Law 1404/83), which aimed at the upgrading of the non-university higher education sector, established the Technological Educational Institutions (TEI). The Technological Educational Institutions are part of the higher education system in Greece (Law 1404/83). The TEIs are self governed institutions supervised by the Minister of National Education and Religions. There are fourteen (14) TEIs in Greece providing for technological education in a large number of study areas (Stavropoulou 1999).

A major reform related to the upgrading of the professional status of nursing and its professional emancipation from the dominance of Medicine was the introduction of University nursing education. The Presidential Decree 184/1979 as modified by the presidential decree 562/1980 established the first Department
of Nursing at the University of Athens, which, since 1983, has become an independent Faculty (Papamikrouli 1993). The Department of Nursing initially ran only post-graduate courses in nursing for registered nurses. Since 1987 it provides for initial training in general care nurses. The Faculty of Nursing of the University of Athens has been initially founded as a 4-year education Department of the School of Medicine of the University of Athens. The Department of Nursing accepted its first students in the academic year 1980-1981. Since the academic year 1983-1984 the Department of Nursing operates as a distinct Faculty of the University of Athens, independently from the School of Medicine. Although the introduction of university nursing education constitutes a substantial move towards the professionalisation of nursing, the dual character of initial nurse education and the division between TEI and university graduates generates an internal hierarchy and conflict within the profession.

Before 1984 three specialisations in nursing were acknowledged a. public health nursing, b. medical/surgical nursing and c. paediatric nursing. Today there are four specialisations for graduate general nurses (law 1579/1985). These include medical nursing, surgical nursing, paediatric nursing and psychiatric/mental health nursing. The study duration for each specialisation lasts one year and is under the responsibility of the Ministry of Health. The specialisation courses initiated in December 1989 in Athens and are taking place in medical centers and hospitals. Entry requirement is at least two years clinical practice (Papamikrouli 1993).

In 1983 a major legislative framework for restructuring the National Health Care service was approved and enforced in Greece. However, although many radical changes were launched in regard to the organisational structure and the medical profession, it did not directly affect the nursing community. The only collateral effect for nursing personnel was related to the institution of the concept for providing primary Health Care. To this end, establishment of Primary Health Centres throughout Greece was realised. In this way, a number of nurses had to move from secondary level health facilities, namely, hospitals to the newly established Health Centres. Even so, the roles and responsibilities that nurses could have undertaken in those Health Centres, based on the quite wealthy international experience, were not even mentioned in the new legislation. This fact, may explain that there was no relevant research done, focusing on the impact of this radical Health Care reform on nurse professionals.

Modernisation and Restructuring of professional Nursing

Major transformations in nurse education took place during the decade of 1990’s which were related to changes taking place at the national and global level. A new legal framework concerning the national educational system introduced radical changes and innovations especially in the secondary and tertiary education in 1997 (Kazamias, et al. 2002). However, those changes did not directly affect the TEI and University Nursing Departments. The changes that were felt a few years later was the relatively suboptimal level of the admitted students, as due to the reform in the secondary and tertiary education the students were more, their performance lower and in the case of TEI were less enthusiast for their studies. On the other hand, the Bologna declaration has influenced nurse education in a significant way. The Bologna declaration
introduces a unified sector of tertiary education based on the principle of a 3 years study for the award of Bachelor degree. In the case of Greece the outcome is that it allows the TEI 3 years graduates to pursue postgraduate studies (2 years Master degree plus 3 years Doctoral degree). Moreover it allows the collaboration between Universities and TEIs for the establishment of common postgraduate programmes. The law 2916/2001 could be seen as the result of the Bologna declaration. This legislation focused on bridging the gap between Universities and TEIs. Also it gave the right to TEIs to set up Master programmes in collaboration with the universities. An important number of research projects were the result of this development.

Moreover, Europeanisation processes have had considerable impact on the construction of professional knowledge in Nursing. A significant number of Master Degrees and PhDs were produced within the period 1997-2000. The exchange of students and academics among European countries provided the opportunity for further research, while scholarships were awarded to University and TEI graduates for postgraduate studies in Greece and abroad. These considerable changes and the evolution of research reflect the nurses’ eagerness to become highly qualified and to gain thus professional accountability, higher professional status and scientific credibility. This was an opportunity for young nurses to upgrade the professional image which has been severely criticised during the past decades from the society and the other health scientists’ groups. On the other hand, the achievement of job security and intra-professional mobility at an era of uncertainty is of course another motivation for seeking academic qualifications.

Moreover, the basic nursing programme in the University included the following courses about research: epidemiology, statistics, methods of research. The Master and the PhD nursing programmes, which are conducted by the University of Athens, include courses about research. In the following section the political and educational changes from the early post-war period until recently, as these affected the nursing profession, are presented.

**Periodicities : Political And Educational Change**

<table>
<thead>
<tr>
<th>Socio-political context</th>
<th>Nurse education</th>
<th>Nursing profession</th>
</tr>
</thead>
<tbody>
<tr>
<td>1945-1967 Post-war period</td>
<td>Nurse training is hospital based. 2-3 years of training – no degree obtained Nurse students are only females and study in nursing boarding schools</td>
<td>Medically dominated The religion aspect is strong and dominates training Lack of research</td>
</tr>
<tr>
<td>Civil war</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dictatorship</td>
<td>Higher Technical Education: 5 nursing schools (1970)</td>
<td>Medically dominated Religion aspect is an important element in training and professional</td>
</tr>
</tbody>
</table>
### Periodisation of research on professional nursing

In this section review of nursing research that is available is attempted. However, this effort is handicapped due to severe difficulties to access all types of research in the field, along with the abundance of grey literature that prevailed especially in the earlier period that this report elaborates. In this context, it is of importance to clarify what is considered as valid research. The underlying notion for research is perceived in the broader possible way so that it includes dissertations, research papers published in English-language journals, and research projects approved and funded by official bodies. They are presented in chronological order, following the periodisation that reflects the main landmarks of welfare state developments in Greece. As mentioned above the absence of a national database of nursing research creates difficulties in estimating the number of completed as well as ongoing nursing research in

<table>
<thead>
<tr>
<th>Periodisation</th>
<th>Description</th>
<th>Research Focus</th>
</tr>
</thead>
</table>
| 1974-1989     | Restoration of Democracy | Transitions in professional Nurse Education:  
a. Four year courses in KATEE and TEI since 1977  
b. University Nurse Education since 1980 | Medically dominated system of training till the 1980s. |
| National Health Care System 1983 | Major outcomes of upgrading nurse education:  
Research on Nursing, Postgraduate Studies, Men enter the profession | Autonomy of nursing as a distinct field of knowledge, nursing theories, models, research based practice, influences from abroad |
| European Union integration process | | Multiplicity of internal hierarchies within the nursing profession |
| Europeanisation Globalising effects Immigration flows | Qualified nursing status is acquired both at Universities & TEIs Exchange programmes with equivalent European teaching Institutes. | Expanding research to all fields of nursing care |
| | Establishment of post-secondary (IEK) and secondary (TEE) nursing education (Private – public) which provide 2-year vocational education for nurse assistants. | |
Greece. There is also no record for significant research pieces from dissertations that have been conducted by Greek nurses in other European Universities.

Nursing research activities in Greece are mostly conducted at an academic level. Universities and Technological Educational Institutions are responsible for developing, facilitating and disseminating research activities in nursing. Main research areas concern the improvement of patient care, health promotion and disease prevention, provision of care to specific group of patients, health education, and communication. No formal coordination mechanism exists for the above mentioned activities. However, the academic community underlines the necessity of developing such supportive mechanisms (Stavropoulou 2003).

**Post-war period 1945-1967**

It is clearly observed that during 1945-1967 there is not research activity in nursing. As it is mentioned above the nursing profession is medically dominated and thus, rather dependent upon medical professionals. Consequently, publication activities are very limited. Existing documents present just an overview of the nursing profession and nurse education in Greece (Johansson 1967; Papamikrouli 1967), or focus on historical nurse personalities, such as Athena Mesolora. It is important to note that there is only one nursing journal in Greece at this period (“Hellenic Adelphe”).

**Dictatorship 1967-1974**

Between 1967-1974 the status of the nursing profession is still medically dominated and no major changes have been introduced. Few published data were produced however, which reflect certain culture and awareness elements that could form the basis for further development in education, training and research. The target is to demonstrate the value of the nursing profession and nursing education in Greece (Eleutheriou 1968; Pakkinen 1974; Papamikrouli 1968). In addition, administration and management of nursing services are discussed for the first time in the literature (Eleutheriou 1971) and formal notes from the general meeting of the members of the Hellenic Graduate Nurse Association are published (Hellenic Adelphe 1973). However, all those data are not based on solid scientific results or research activities but rather to theoretical prospects of development. Finally, the absence of any organised research activity reflects the flawed underlying system of education and the absence of formal education at a tertiary level.


Similarly to the previous period, few published data can be found during 1974-1989 regarding nursing in Greece, despite major changes in the state of education and health legislative frames that were introduced in Greece during this period. The issue of demonstrating the activities of the nursing community in Greece still is of major concern (Lanara 1975). In late 1970 the first scientific nursing journal is published and key issues of nursing legislation for practice, education and professional status are discussed (Noseleutike 1979). In addition, the anxiety of getting along with contemporary nursing aspects and providing special educational programmes to nurses makes a breakthrough to the professional community (Lanara 1989). This is also in line with the major educational changes and the transition to the tertiary education which takes place during that period. Nevertheless, published data of this period do not reflect
A Literature Review of Welfare State Restructuring in Education and Health in European Contexts: Implications for the Professions and Professional Knowledge

research results or any scientific evidence, focusing on new educational prospects such as continuing education (Popiel 1981) and overall nursing challenges at a national level.

During the period 1974-1989 there are only a couple of recorded theses at a Ph.D. level concerning nursing in Greece. It is important to note that only one of them is conducted in the University in Athens. The topics of these theses are:

- Psychiatric nursing: a conceptual approach-a textbook for Greece (1975) The University of Connecticut – Department of Metallurgy US
- Socio-economic factors influencing hospital staffing with nursing personnel (1987) National and Kapodistrian University of Athens – Department of Nursing

The last years of this period seem to be the most crucial ones for the nursing profession in Greece, since new pillars were set for the nursing education and great efforts were made in trespassing from the empirical domain to the scientific evidence and research-based profession. The impact of this evolutionary period will be clearly reflected in the following years by raising new concepts such as autonomy, accountability and a unique, robust body of knowledge for the nursing profession.

**Welfare state restructuring 1990 onwards**

From 1990 up to now, it appears that the knowledge and expertise gained through the activities of the past decades start being capitalised. Issues of nursing in the new millenium are discussed (Styles 1991). There are cases where focus strives to issues of continuing education (Lanara 1994) and of specialised nursing care (Bakalarou 1997; Kalopise 1991; Kotzabassaki 1997b; Stavropoulou and Zervou-Valvi 1993). Evaluation of education as an issue of great importance is explored in nursing literature in late 1990's and discussion continues in the next decade (Kotzabassaki 1997b; Stavropoulou 2004). At the same period evaluation of care is discussed (Skalkidis and Stavropoulou 1996) and nursing is explored as a prospective career path for young students (Kotzabassaki, et al. 2003; Stavropoulou and Biley 1997). It is also evident that efforts have been made to follow up the rapid technological development and to apply it in the daily nursing practice (Dounavis 1997; Mantas and Diomidus 1998; Tsirintani 1995). Issues of health workforce status and nursing manpower in Greece are discussed (Kyriopoulos and Andrioti 1995; Plati 1998). It is also during this period where major scientific activities took place, such as conferences at a national and international level. The exchange of knowledge and expertise is of primary importance. In addition, during this decade major breakthroughs toward Europe are experienced. Nurse students and teachers are supported to participate in European exchange training programmes. Those remarkable changes led to a rapid development of a new culture, a unique body of knowledge for nursing, while they set the basis for autonomy and accountability in the profession. Evidence based practice and new concepts such as quality in care and gave a great push to the nursing research domain.

The published data in the new millennium demonstrate the effects of the major scientific breakthrough towards Europeanisation and the exchange of expertise which led to the development of new knowledge and new culture in the nursing profession in Greece. Nursing profession seems now somehow freed from
medical profession gradually but steadily gaining its autonomy, its own unique character and role. Almost as a consequence to those revolutionary changes that the nursing profession started experiencing during this period, the development of its own research agenda was established. Thus, it enabled the nurse professionals to apply research evidence to practice and further investigate these actions. Specialised nurse education and issues of clinical nurse education are explored (Bakalis 2004; Kotzabassaki 1997a; Lemonidou 2004; Savopoulou 2001) and implementation of research methods in nursing care are considered (Patiraki 2004; Stavropoulou and Zervou-Valvi 1993; Tafas 2002). In addition staffing and organisational issues of nursing and the provision of specialised nursing care are presented in relevant literature (Merkouris 2003; Panagiotopoulou 2002; Sourtzi 2003). It should also be highlighted that the educational system of these last years is also affected by the EU directives and the Bologna declaration. The impressive proliferation of postgraduate degrees (Master degrees and PhDs) which are conducted by the nurse graduates either in Greece or abroad provides a solid scientific basis for further development of research activities and the application of sound research evidence practice in the nursing profession.

A considerable number of doctorates were produced by the Nursing Faculty of the Athens University, especially after 1999, focusing on a variety of topics (from history of nursing to Health Care financing and specialised nursing care). The amount of research produced clearly indicates the rapid development and research awareness of nurse professionals along with the major educational changes experienced by nurses.

The recent research evolution reflects the underlying educational change that took place. Accordingly, these developments contributed to the alteration of the professional culture. Nurses became more aware of issues such as, nursing research methods, nursing models, quality of care, nursing and technology, job and patient satisfaction. In new established hospitals already from the 1990’s, programmes of quality of care, the provision of individualised nursing care, the concepts of nurse-liaison and clinical research programmes start been implemented. These programmes and the nurses’ new roles continue to develop presently and are expected to have a rapid evolution in the forthcoming years.

**Research and Politics on Professional Knowledge and Work in Teaching and Nursing**

Research presents a striking relationship to the socio-political context. The extent to which research is developed and flourishing is directly dependent on the prevailing political conditions. This is particularly the case for social and political science research. Freedom of expression and academic autonomy are, naturally, key prerequisites for research to exist. Authoritarian, absolutist and nationalist ideological control has inhibited social research in post-war Greece till 1974. While in the sixties and early seventies education and health research in central and northern Europe address issues of equality of opportunities and professional autonomy, in Greece research is not possible. These issues become central themes of educational and health research only after the mid-seventies in Greece. However, the quest for democratisation and modernisation has been a
long-standing and pending demand, especially on the part of the political Left and the student and teacher unions.

The type of the citizen-state relationship and the extent to which welfare state is developed genuinely affects research agendas. It could be argued that research in Greece presents a delay in accordance to the country’s welfare state development time lag.

In the post WWII period and almost uninterruptedly till the fall of the dictatorship in 1974 the dominant discourses in both teaching and nursing deal with issues related to the ideological role of the respected professions. The humanitarian aspect of education and Health Care are underlined and viewed through the ideological construction of the ‘Helleno-Christian civilisation’ that is promoted by the authoritarian political regime. Teaching and nursing are perceived as missions rather than professions. While teachers’ mission should be to mould the mind, the nurses’ mission should be to care for the body.

Democratisation and welfare state expansion are key determinants that facilitate educational research in the 1974 to 1989 period. The issues of democratisation of education institutions and expansion of education system are on the top of educational research agenda. Education research is largely influenced by the ideas of a Greek intelligentsia who has been forged through the historical memories of the civil war, the anti-junta student movement and the socially progressive or alternative ideas of the European student movements of the sixties. The upgrading of the initial education provision for both primary education teachers and nurses has contributed to the development of research in the respected fields in the eighties. The Educational research focuses on issues of educational reform, social inequalities, gender discrimination and social selection processes. A number of studies focus on teachers’ initial training, evaluation, trade-unionism and socio-economic background. Research on nursing on the other hand is still at an embryonic stage in that period, since nursing is undergoing a transition process towards professional autonomy and emancipation from the dominance of Medicine.

From the 1990’s onwards the wider climate towards redefinition of social democracy in Europe influences the context and content of welfare state policies in Greece. Europeanisation and globalisation processes have dramatic impacts in Greek society and influence politics regarding teaching and nursing. They inscribe research agendas and they become themselves main themes of research. Restructuring is an emerging theme of research in education while a substantial number of empirical studies focus on teachers and nurses as professional subjects. More specifically, the educational research agenda includes issues such as: Europeanisation and globalisation in education and their impacts on working conditions, learning environments, technologies of teaching as well as on changing social conditions for discrimination and exclusion in education are main themes of the research agenda in the last decade. Teachers’ identity, professional development, job satisfaction, stress and occupational burnout as well as issues of gentrification, professionalisation and proletarianisation of teaching become also central themes of education research. On the other hand, research on professional nursing is rapidly developed in the last decade addressing mainly issues of professional development and autonomy, social perceptions and attitudes regarding nursing, quality in nurse education and Health Care.
There is no research, however, attempting a cross-professional study of these two key determinants of welfare state provision.
Chapter 5

State Educational Policy and Teachers’ Work in Portugal (1960-2004): A Review of the Research Literature

Jorge Ávila de Lima

Introduction

Public teaching as an occupation has existed in Portugal since the end of the XVIII century, but research on teachers’ work is much more recent. It was only after the democratic revolution of April 24, 1974, that academics and teachers were allowed to investigate and publish their work. Until then, the fierce dictatorship that ruled the country from 1926 to 1974 prohibited public analyses and discussions of teachers’ work lives, which were regarded as a challenge to the ruling power. After the revolution, in 1974, educational research focused preferably on general social issues, such as educational and social inequality and the causes and consequences of school failure. Comparatively, until the 1990’s, teachers’ work lives received little attention.

The gradual attention given to teachers and to their work after the end of the 1980’s was the result of several trends, namely, new state policies that drew attention to the effects of legislation on schools and teachers, a growing recognition – both from policymakers and from the academic community – that schools as organisations were important factors in the production of school failure and social inequality, and theoretical and methodological changes in the academic world, which resulted in the retreat of macro-structural analyses and survey studies, and in the growing influence of micro-studies of school processes employing qualitative strategies and interpretive analytical procedures.

Because of the abovementioned factors, Portuguese research on teachers’ work is still in its early stages, although much progress has been made in the past 15 years. The youth of this field of inquiry is the major reason behind its unsystematic nature, its sparseness and the absence of crucial themes that have not yet been researched, as will be apparent in this review.

The present report gives a broad overview of the current state of research on teachers’ work in Portugal. The report is organised into four main sections. First, it provides a global characterisation of the objective conditions of work in the profession, since the 1960’s, and of teachers’ reports of their professional experiences throughout this period. This section includes research on demographic features of the profession over time, its social composition, gender patterns, teachers’ subjective work experiences (reasons for choosing the profession, work motivation, job satisfaction, loneliness, and stress), and the relation between professional and personal life. The second section of the report deals with teachers’ career development and is divided into two main parts: the initial years of work and stages of career development.
The third section is dedicated to teachers’ work cultures and professional identity. It starts with a broad characterisation of the main features of teachers’ professional cultures, as depicted in the research literature. Following this, it presents research results on teachers’ responses to state-mandated reforms. Finally, it explores teachers’ construction of professional knowledge in their work contexts, and their construction or reconstruction of professional identity. The fourth and last section is dedicated to methodological issues and provides a brief overview of the main research approaches that have been used in Portugal during the period under analysis. The report closes with a summary of the main results and a critique of the thematic, analytical and methodological approaches that have predominated in research on teachers’ work in the country.

**The Teaching Profession: Objective Conditions and Subjective Experiences**

**Demographic trends**

There is no adequate updated research on the teaching profession’s evolution until 2004. The most comprehensive study on the issue (Braga da Cruz et al., 1988) was published in the end of the 1980’s. The study was commissioned by the then Minister of Education, Robert Carneiro, and covered a wide range of work issues, from demographic characteristics of the profession to actual work conditions and perceptions of the job. Since then, only partial studies have been conducted that give a sparse picture of the current situation.

In Portugal, the number of teachers has grown enormously since the 1960’s and, especially, during the 1970’s and 1980’s. This virtual quantitative explosion was the result of the rapid diffusion of mass education that was initiated in Portugal with the Reform of Minister Veiga Simão, in the early 1970’s, and which was taken up by subsequent governments during the 1980’s. This growth was more intense than the rise in the number of students: between 1964/65 and 1984/85, the number of teachers more than tripled, while the number of students didn’t even double (Braga da Cruz et al., 1988:1191).

The quantitative growth of the profession was most evident in post-primary education: in the middle of the 60s, primary schooling integrated around 60% of all teachers; in 1984/85, it included only 31.2%. According to Arroteia (1989), in the 2\textsuperscript{nd} cycle (grades 5 and 6), there was a very significant increase from around 13 thousand teachers in 1974/75 to nearly 30 thousand in 1986/87; in the secondary sector, the rise was from around 15 thousand in 1974/75 and over 42 thousand in 1986/87.

This quantitative growth reinforced the professional de-qualification that was already a visible feature of the profession and increased its internal heterogeneity, due to a diversification of the qualifications that officially accepted to become a teacher. This had a negative effect on teachers’ social status. Due to the intense demand for teaching jobs and to the scarce number teacher training institutions in Portugal, teaching, especially at the middle and secondary levels, became more and more a job performed by young people without proper academic qualifications and specific professional training. In 1973/1974, around one third of secondary teachers had no adequate academic degrees that licensed them to teach and in the beginning of the 1980’s, 25% didn’t even have a higher education degree (Braga da Cruz et al.,...
The situation has gradually improved since then: the percentage of teachers with specific professional training has risen from 47.6% in 1981/1982 to nearly 70% in 1989 ((Braga da Cruz et al., 1988:1201).

The strong quantitative enlargement of the profession since the early 1970’s has resulted in its juvenilisation, especially at the post-primary level. More recently, the gradual decrease in the number of admissions to teaching has started to invert this trend (Braga da Cruz et al., 1988:1195). Teachers in the primary sector are the oldest: in 1964/1965, the percentage of those with more than 35 years of age in this sector was only 38.7%; in 1985/86, it was 62.6%, and the trend tends to intensify as the number of new primary teaching jobs that are opened gradually decreases (Braga da Cruz et al., 1988:1195).

Another important feature of the evolution of the profession is its feminisation, which is a consequence of the growing schooling of women, the massification of education and the departure of men, destined to emigrate or to fight in the colonial war, especially in the 1960’s (Brandão, 1999:79). The general feminisation rate has increased from 72.4% in 1964/1965 (Braga da Cruz et al., 1988:1197) to 76.32% in 1996/1997 (António, 2004:28). This rate is higher in the lower levels of schooling. In primary teaching, for example, there is virtually a “female monopoly” (around 90%) of the profession (Sim-Sim, 2004:147).

Additionally, the evolution of teaching is marked by the strong presence of the State as an employer. Between the mid 60s and the mid 80s, while the number of teachers working in private schools increased by 50%, those teaching in public institutions tripled (Braga da Cruz et al., 1988:1199). In the beginning of that period, private school teaching represented 17.9% of all teaching jobs in Portugal; in 1984/85, it represented only 8.9% (Braga da Cruz et al., 1988:1200). Until the 1950’s and the 1960’s, the dictatorship clearly privileged private schooling, especially in the secondary sector, but subsequently the relation between both sectors was totally inverted (Grácio, 1998).

**Social composition of the profession**

We know very little of the social origins of Portuguese teachers. Braga da Cruz et al.’s (1988) study is the most comprehensive to date, regarding this issue. A few other studies (Benavente, 1984, 1990, Cavaco, 1990, Lima, 1995) provide additional information on the matter, but are restricted to specific geographic regions or to particular sectors of the school system.

According to Braga da Cruz et al. (1988), the teaching profession has been an important social promotion vehicle for many citizens in Portugal. The authors’ data suggest that most teachers come from social strata below teaching itself: for example, 21.5% have working class backgrounds.

In a study of the social origins of students enrolled in two primary school teacher training institutions, Benavente (1984) found that most came from the small rural and urban bourgeoisie and also from some sectors of the working class. 72% of their parents and 81% of their mothers had reached, at the most, the 4th grade of schooling, which indicated that most primary teachers came from culturally deprived contexts. Therefore, for them, teaching represented, in fact, a strong social promotion.
In another study, Benavente (1990) analysed the occupations of primary teachers’ parents. The fathers of the 51 teachers that participated in the study were placed in the following social-professional categories: 7.4%, middle and higher rank staff, and liberal professions; 35.2%, small independent businessmen (tradesmen, industry businessmen, landowners); 20.4%, public employees and clerks; 25.9%, industry workers, 5.6%, low-rank officials. As to the mothers, the overwhelming majority (79.6%) were housewives. In the same study, Benavente found that 25.9% of the 54 primary teachers that she interviewed in Lisbon were married to middle and higher rank staff, or to liberal professionals, 55.6% to employees or civil servants, and 5.5% to teachers, while 13% were single or divorced. None of these teachers were married to people of a lower social status than theirs, which points, in the author’s words, to “clear social ascension through marriage” (Benavente, 1990:167).

In a study of secondary teachers’ social background in the Azores, Lima (1995) found that 33.6% came from the bourgeoisie, 44.9% from the small bourgeoisie and 21.5% from the “lower classes” (10.3%, small peasants and 11.1%, industry workers). This data differs from that reported nationally by Braga da Cruz et al. (1988), which suggests that teachers’ social background may vary widely across geographical regions in the country.

**Gender patterns**

Referring to primary schooling, Benavente (1990:92-93) states that schools are “a mostly feminine world which is marked by women’s myths, values, ideas, prejudices, limits, contradictions and potentialities”. Brandão (1999) also stresses that the strong feminisation of teaching has given way to “specific ways of exercising the work that are produced by the interaction between the teacher and the mother roles”, which have introduced “a specific symbolic universe” in education. However, little research has been produced in Portugal to systematically characterise this alleged singularity and its consequences for teaching and for students’ learning.

A small set of studies illustrates vividly how teachers’ work experiences are framed by gender factors (Lopes, 2001, Rocha, 1998, Trigo-Santos, 1997; Vasconcelos, 1997). These works show the specificity of female teachers’ professional trajectories, which are interpreted by authors mostly as a function of the asymmetric relations that exist between men and women in society, generally (Araújo, 2002:122). However, most of the references to the gender issue are made indirectly, in studies that focus on other aspects of teachers’ lives (Benavente, 1990, Brandão, 1999, Caria, 1999, Estrela, Rodrigues, Moreira & Esteves, 1998, Loureiro, 1997). Because of the rarity of the former, some key findings of the latter studies will be mentioned in this section.

Benavente (1990) states that primary teachers relate to their profession and to their workplace in ways that are distinct from those of their male colleagues. In particular, the author stresses that despite the fact that female teachers have more “qualities” that are an asset to the profession, they stand at the bottom of the hierarchy of the educational system. The author provides data that show that, in 1977, of the 22 regional educational directors that existed in Portugal, all were male teachers. Also, among a total of 60 school inspectors, 71.7% were men (Benavente, 1990:88).
This issue was explored further by Rocha (1998). The author conducted an empirical study of the gender composition of leadership teams in all the public schools of the district of Braga, between 1987 and 1995. Rocha found that of the 773 members that comprised these teams, 47.6% were female and 52.3% were male, which, apparently, would seem to imply that there was no major disparity between the number of male and female people in these jobs. However, if we take into account the high feminisation rate of the schools that were studied, this apparent gender parity becomes illusive, because women in those leadership teams represented a significantly low proportion, when compared the proportion that they represented in the profession, overall (around 70%).

Besides, Rocha (1998) seems to miss the critical fact – which is clearly visible in her own data – that the position of head of school in these teams was far from being evenly distributed according to gender. Indeed, in the secondary schools of the abovementioned district, among the members of the teams whose mandate lasted at least two years, between 1987 and 1995, men represented 75% of all major leadership positions. Moreover, national data for the 1996/1997 school year show that men predominated over women in the occupation of these higher posts overall in the country (54.8% against 45.2%) (Rocha, 1998: 37). Data collected by Trigo-Santos (1997) also show that in 1997, in the Portuguese mainland, in a total of 945 headship team positions, 53.8% were occupied by men, and among the 44 executive directors of schools that were in post, 68.2% were also men.

Loureiro (1997) found important differences between men and women in teaching. The author’s data show that men tended to have more problematic professional trajectories, more negative attitudes toward the profession, more passive reasons for having chosen the job and more experiences of professional “crises”. Caria (1999) also identified a “marginal conduct” among most of the male teachers that he studied, when compared to their female colleagues. These men participated less in the life of their school than women teachers, which the author interprets as the result of men giving “less priority” to this participation, because of their regular exercise of additional paid work outside of the school (Caria, 1999:215).

Finally, Estrela, Rodrigues, Moreira & Esteves (1998:142) found significant differences in the training needs that were expressed by male and female teachers. In their study, women seemed to be more motivated to work individually with students, which led them, more than men, to value types of training that might develop their interpersonal communication skills and the competencies that would help them to better evaluate their students and their contexts.

**Working conditions**

Research on Portuguese teachers’ work conditions has focused almost exclusively on the issue of job instability. This instability is expressed in a very high teacher geographical mobility, as every year teachers (especially those who are in their first years in the profession) apply to a new school, until they are able hold a position in a specific institution on a permanent basis. This large geographical mobility is the consequence of the “school explosion” of the 1970’s and of the subsequent need to organize the school system, as well as a direct effect of the conditions of admission into the profession, by which teachers with lower qualifications are legally forced to apply to a school year after year, until they get tenure.
Between the end of the 1970’s and the end of the 1980’s, more than 20% of all Portuguese teachers moved to a different school, at least five times. This percentage rose to 40% to 50% of teachers in middle and secondary schooling who moved from 3 to 4 schools in the same period. Only 30.6% of all teachers stayed in the same building during that period (Braga da Cruz et al., 1988:1219). Teachers who were less than 36 years of age were the ones who were most affected by this phenomenon: more than 60% worked in at least four institutions in the same period (Braga da Cruz et al., 1988:1220). This contrasted with teachers’ desires: 75% declared that they would like to remain in the school where they worked.

As Formosinho, Ferreira and Ferreira (1998) have shown with respect to primary schooling, high staff turnover produces pedagogical discontinuity between teachers and students, teachers and their colleagues, teachers and parents and teachers and the community. The authors cite data published in 1998 by the Ministry of Education which show that only 47% of primary teachers stayed in the same school for two consecutive years. More generally, Sanches (1987) reports that teachers’ geographical mobility affects 60% to 70% of the staff in many schools, which results in a virtual “annual migration cycle” (see also Branco & Figueiredo, 1992). According to Formosinho, Ferreira and Ferreira (1998), this has serious negative consequences for the students and for their families, it impedes the development of school educational projects and is an obstacle to pedagogical innovation and to teachers’ contextualised training. In circumstances such as these, schools cannot be regarded as communities. Because of the legal obligation that forces teachers to apply every year to a new school, the authors state that “the State is the main sponsor of teacher instability and of the consequent destabilisation of schools, with all its implications for the students, the families and the teachers themselves” (Formosinho et al., 1998:58).

This situation is aggravated by the fact that, in many schools, even though the number of permanent teaching posts covers only about half of all teaching needs, a considerable proportion of tenured teachers is still allowed to leave the school temporarily to work in other services of the educational system (for example, in the local, regional and central offices of the Ministry of Education). Therefore, some teachers who get tenure in a school that is far from their place of residence remain in these offices until they are able to get the school that they really want, nearer their homes. This compromises the quality of education even further. This “objective convergence”, as Afonso (1994) calls it, between the interests of the administration and those of many teachers explains, at least in part, why many teachers resist official decentralisation measures and school autonomy laws, which would imply that the management of human resources (and, consequently, of their own mobility and work assignments) would be done locally and not centrally. Indeed, in a questionnaire that was distributed to all teaching staff in a school, 48% disagreed with the possibility of schools hiring teachers directly; only 21.9% agreed with the idea. Significantly, in the case of tenured teachers, these percentages were 59.2% and 14.8%, respectively (Afonso, 1994:197).

Many schools are thus “places of passage” where there is no climate that leads to the development of a sense of belonging to the institution. In this respect, Sanches (1987) identified an important effect of high staff mobility on many educational
organisations: the difficulty of forming school leadership teams (which are called “executive boards” in Portugal). The transient nature of the teaching career makes it difficult for teachers to know one another in their institution, which is a necessary condition for the formation of cohesive teams. This problem has resulted, in many cases, in the State imposing particular leaders upon schools, because no group of teachers in the school applied for the job.

Also, as Cavaco (1993) has underlined, many teachers who still lack the necessary professional qualifications to get tenure are forced to travel long distances everyday, or to live provisionally hundreds of kilometres away from their homes. Usually, these teachers are not the target of any specific training plan in the institution to which they are appointed. Most of them teachers are hired when the school year has already begun, when interpersonal and group relations have already been formed, and frequently they are “pushed into the classroom without any support” (an expression that was used by one of the author’s interviewees). This experience of constant mobility is associated with feelings of uncertainty, lack of safety, anxiety, social disaggregation and discouragement (Cavaco, 1990).

In teachers’ reports on their professional life, Brandão (1999) identified a huge time gap between entry into the profession as a provisional teacher and the achievement of tenure. As she notes, the passage from provisional to tenured teacher, which may take many years, constitutes “a marking period” in teachers’ lives: it is the crucial moment that divides their professional and personal life into “before” and “after” (Brandão, 1999: 86).

Pinto (2000) has also called attention to the consequences of teachers’ job instability for interpersonal relations in schools. The author studied five primary schools in the region of Lisbon and Vale do Tejo, between the school years of 1998/1999 and 1999/2000. He found that the mean percentage of teachers who moved to a different school in this group of institutions was 34%. Despite the legislation that points to the need for the teacher to follow her students from grades 1 to 4, Pinto (2000) found that these sound principles were “subverted by reality” (2000:90): in three of the schools, there was a clear relation between teachers’ mobility rate and student retention; the teachers that moved to a different institution were also the ones who failed their students the most. As the author notes, it seems as if job instability makes student retention more likely and “pedagogically more acceptable” (2000:93). Teachers who leave are concerned with what the forthcoming teachers of their students will think about their work; their concept of professionalism thus leads them to make more retention decisions, so that their colleagues won’t think that they are too lax with their students.

**Subjective experiences in the job**

One of the topics that have deserved some attention from Portuguese educational researchers is teachers’ motives for entering the profession. Around 63% of those who were questioned by Braga da Cruz *et al.* (1988:1207-1208) stated that teaching was a vocation and that it had been their first career choice, while 15.4% explained that they had found no other alternative. This reference to teaching as a calling decreased from the lower to the higher ranks of schooling: it was 65.7% among primary teachers and 58.7% among middle school and secondary ones. The percentage of those who referred to teaching as the only alternative available varied
inversely: 10.4% and 18.8%, respectively. Moreover, in middle and secondary school teaching, only 43% of the teachers had decided to become teachers before they enrolled in a teacher training course. This differed considerably between male and female teachers (34.1% for the former, and 50.9% for the latter) (Braga da Cruz et al., 1988:1214). Another significant gender difference was that men referred less to teaching as a vocation (54.3%, compared to 67.8% among women) and referred more to the absence of other alternatives as a reason for having become a teacher (23.5% and 11.7%, respectively) (Braga da Cruz et al., 1988:1208-1209).

However, Benavente (1990) found that often women teachers’ “choice” of primary schooling as a career is “forced upon them” by economic reasons. Many of the teachers that the author interviewed looked at primary school teaching as “the best of all least desired options”, because they could not afford the more expensive university courses to which they really aspired (Benavente, 1990:195). Several teachers explained that they entered primary teaching because they did not enjoy the possibility of leaving their village and their family to go study in a big city where the universities were located. In their places of residence, primary school teaching was the best (and often only) choice that was available and also the only one that was regarded by the community as an adequate career for a woman. For this reason, Benavente (1990) states that for many primary teachers, teaching is less a vocation than one might think: on the contrary, it is the result of family, economic and social constraints. Indeed, 73.3% of the women teachers that she interviewed named reasons other than a “calling” for entering the profession. In the author’s view, this has important implications for the way teachers experience their profession: “men try to leave it, women stay, sometimes upset” (Benavente, 1990:200). In her view, this explains many teachers’ ambiguous relation to their profession, their unwillingness to invest in it, or the specific forms that their professional commitment takes.

However, other studies point to different conclusions. For example, in a study that comprised auto-biographical interviews with 42 primary female teachers in the Algarve, Gonçalves (1992) reports that 62.8% stated that they chose teaching because it was a vocation for them. The remaining 37.3% said that they followed this path because of the absence of other career alternatives, or due to economic reasons.

Another issue that has been researched is teachers’ work motivation, once in the job. Moreno (1998) conducted a study with 67 committed teachers from 8 schools that aimed to identify which factors contributed most to their work motivation. The author found that the variables that were more important in explaining teachers’ work motivation referred to intrinsic aspects of the job: relations with students, job autonomy, work diversity and challenges in the performance of work tasks.

Sanches (1987, 1990) investigated teachers’ “organisational involvement”, measured as the set of motives that make teachers want to participate in the governance of their school. The author was particularly interested in understanding why many members quit school leadership teams in secondary schools and why many teachers are unmotivated to participate in them. The study involved a survey of teaching staff and school leaders in a national random sample of 173 secondary schools. Interviews were conducted with members of the leadership teams in a sub-sample of 30 of these schools. The author found that the exercise of work functions in a school leadership team was regarded as so difficult and bureaucratic that only a small percentage (28%)
of individuals with high self-efficacy remained in that kind of job. Moreover, among regular teachers, only 24% of those who had high self-efficacy were willing to be part of a leadership team.

Sanches (1990) identified two reasons why team members didn’t want to run again for their posts: work conditions (lack of support and feedback from superiors, exclusion from major decisions that affected school governance, instability of the job, short duration of the mandate – two years –, insufficient pay, overcrowding of the school) and the nature of the job itself (insufficient autonomy, predominance of bureaucratic activities over pedagogical ones, lack of recognition of work accomplishments). The study also showed that while motivations to participate in the governing of the school stemmed from intrinsic and altruistic reasons (such as the wish to experience functions of responsibility, or the opportunity to improve professionally or to experience a change in the career), factors underlying the lack of motivation to participate in this governance related to aspects such as the “psychological climate” of the workplace and the work context (namely, the policies of the Ministry of Education, or the specific work conditions of the school). Sanches (1990) concludes that the lack of job satisfaction and of work motivation that she identified in her study of school governance should not be viewed in isolation from what it means to be a teacher in Portuguese secondary schools, because they express an overall negative state of mind among teachers. She attributes this state of mind mainly to the external context of school governance, which in her view favours the development of a bureaucratic mentality and inhibits teachers’ organisational maturity.

Teacher stress has also been the subject of some research. In this respect, Lens and Jesus (1999) found that younger teachers (between 25 and 35 years of age) suffered less from this phenomenon and were more satisfied than their older colleagues. The teachers who suffered more from stress were those in the intermediate age range (36 to 45 years). Also, women teachers suffered significantly less from stress and were more satisfied with their job than their male counterparts.

Teacher absenteeism has also been researched. Studies conducted by the Ministry of Education (quoted by Alves, 1994: 30-31) indicate that teachers’ monthly average number of days of absence from work is two. Braga da Cruz et al. (1988) report that 60.3% of teachers state that they usually don’t miss work, but 38.9 % admit that they miss one or two classes per month (which was exactly the maximum that was permitted by law at the time that the study was conducted). Data collected by Alves (1994) in a sample of 129 middle and secondary school teachers in the district of Bragança indicate that around 39% of them admitted that their absenteeism resulted from the experience of stress in their job.

Neto and Barros (1992) studied the experience of solitude among a sample of 296 primary, middle and secondary school teachers. Solitude was defined as “the discrepancy between the type of social relationships that one desires and the type of relations that one has” (Neto and Barros, 1992:1). In their sample, the authors found a mean value of solitude of 35.2, in a possible range from 18 to 72. No data exist that permit comparisons between this value and results for other groups, either within or outside teaching. The authors also found that solitude levels were higher among
primary school teachers than among those in the higher levels of the educational system.

As Trigo-Santos (1996), remarks, job satisfaction has been one of the most researched issues with relation to the teaching profession in Portugal. Seco (2001), for example, sought to identify the “predictive efficacy” of psychological constructs and of social-demographic variables on teachers’ job satisfaction. The author conducted a survey study with a sample of 752 teachers working in the 2nd and 3rd cycles and in secondary schools. Seco found that psychological variables (namely, personality characteristics such as locus of responsibility, motivational orientation, self-esteem and personal sense of autonomy) were better predictors of teachers’ job satisfaction than social-demographic ones (such as age, gender, marital status, academic qualifications or professional situation). This finding leads the author to advocate the promotion of professional development programs that focus on teachers’ “psychological growth” through strategies for developing their personality-level competencies, which she regards as crucial for a better adjustment to work situations. This view expresses a conservative approach that assumes that it is teachers who must adjust to their current work situations, instead of these having to be readjusted to fit professionals’ needs.

Several studies have researched teachers’ job satisfaction with relation to a specific indicator: teachers’ expressed wish to leave the profession. In a study of a secondary school located in a city in the centre of Portugal, Loureiro (1997) found that the participants expressed a positive attitude towards teaching and declared that they did not feel the wish to leave, although sometimes they went through professional crises. However, in Braga da Cruz et al.’s (1988) national study, more than 35% of respondents declared that they would leave teaching, if they had the opportunity. Again, men and women gave different answers: 46.8% for the former, compared to 30.8% for the latter. This also varied with teachers’ age: the wish to leave was expressed by 41.3% of those who were 25 years of age or younger, and only by 16.3% of those who were older than 56. Primary school teachers were the ones who wanted to leave the less: 23%, compared to 42% in the 2nd cycle and to 45% in the 3rd cycle and in secondary schooling. While the propensity to leave teaching was understandably greater among teachers who were on provisional contract (48.5%), it was also significant among teachers who were already tenured (29.2%). The main reasons that teachers provided to justify this attitude were the low pay (32.6%), the “degradation of the career” (21.7%), and the “lack of stimulus” (19.8%).

In Alves’ (1994) study, the percentage of participants who declared the wish to leave was similar: 29%. Gonçalves’ (1992) study found that 69.1% of the 42 primary teachers that he interviewed admitted that they might leave teaching, mostly because they felt tired and “saturated” by a profession that they regarded as “consuming” (Gonçalves, 1992:160).

According to Jesus and Abreu (1994:215), Portuguese teachers’ work motivation and job satisfaction is lower than that of their colleagues in other European Union countries. In a study of teachers’ “motivational orientation” (the desire to stay in teaching, or to leave), the authors found that teachers’ desire to remain in the profession was higher when they expected that they would have no undesirable professional experiences, when they had high expectations about developing positive
relationships with their students and when they had expectations of professional fulfilment. Interestingly, in this study, teachers’ expectations in relation to work conditions had no impact on their willingness to stay or to leave the profession.

Alves (1997) analysed job satisfaction in a sample of 129 teachers in Bragança. The data was collected in 1990. In general, teachers expressed “a frankly positive attitude” towards their profession and “only a quarter” stated a desire to quit for a different job. Teachers also declared themselves generally unaffected by stress or by professional fatigue. However, most of them expressed dissatisfaction with their salary (30.23% agreed with the statement that it was below what their work entitled them to, and 62.79% agreed completely) and with the lack of institutional support from the Ministry of Education (44.96% agreed and 41.86% agreed completely that this was a source of career disappointment). As in other studies, men were more dissatisfied than women in these respects.

With respect to teachers’ actual work conditions, Braga da Cruz et al. (1988) found that most respondents had a negative view of the material conditions under which they worked. The aspects that received more unfavourable critiques were the lack of space in the school (54.1% of negative opinions), the inadequacy of the equipment (47.2%), the overcrowding of the school (46.4%) and the insufficient number of support staff (42.5%). Alves’ (1997) results complement this view. The author’s participants felt that their organisational working conditions were inadequate: in particular, they regarded the structuring of the work schedule as an obstacle to positive pedagogical relations among colleagues.

Carvalho (1992) studied the relation between organisational life in schools and the teaching profession. In a case study of two schools, he found that, generally, teachers’ perception of the organisational climate in their school was positive, but it differed considerably between those who wished to stay in the institution (78%) and those who wanted to leave (57%). The author also found a higher frequency of negative and very negative perceptions of the schools’ climate (which was often characterised as closed, paternalistic and authoritarian) among regular teachers than among those who performed school governance functions (31.4% among the former, as compared to 13.3% among those who were members of the pedagogical council, and to 0% among members of the school leadership team).

Carvalho (1992) identified the following distinctive characteristics of teachers who stated that they wanted to leave their school: low involvement in the decisions taken by their subject group, a very negative perception of the school’s climate in relation to their involvement in leadership team and pedagogical council decisions, lack of satisfaction with the work performed at the school, a very negative perception of the cooperation between the school’s teaching staff, a negative perception of the degree of influence of the leadership team over the life of the institution and a negative evaluation of its leadership processes. Analysing the reasons put forward by teachers to describe their school as attractive or non-attractive, the author also found that the most important criterion that respondents used was the quality of interpersonal relationships (especially, relationships with colleagues and with the students); the school’s working conditions came only in second place.
In two national surveys that involved nearly 5,000 respondents, Teixeira (1995) sought to understand how teachers evaluated different aspects of life in their schools and how they felt these helped fulfil their potential as professionals. The teachers expressed satisfaction with the support that they received from the leaders of their school when they experienced discipline problems with their students. They were also satisfied with the relations that they maintained with their school colleagues and more than half stated that the climate in the staffroom was positive. To evaluate the images that the participants had of their work conditions, Teixeira considered four aspects: general discipline in the school, the work schedule, school equipment and incentives for in-service training. Most participants were satisfied with the discipline and the work schedule, but were strongly dissatisfied with the equipment (only 1.5% rated it as “highly satisfactory”) and with the incentives that they received from their leaders to take in-service training (only 30.3% were satisfied, and only 3.6% highly satisfied).

Finally, a few studies have focused on teachers’ self-attribution of social status or social prestige (Alves, 1997; Benavente, 1990; Lima, 1995). Alves (1997) found that 34.9% of the teachers that participated in his study agreed and 61.2% agreed totally that, compared to other professional categories of the same academic level, teachers occupied a socially inferior position. Benavente (1990) asked 30 teachers if they felt that their profession was rewarding from a financial, a social and a personal point of view. The percentages of positive answers to the question were 26.7%, 23.3% and 76.7%, respectively. Lima (1995) studied the way Azorean secondary teachers situated themselves in social space, in 1990/1991. The study showed despite the widespread public discourse on the degradation of the profession, very few of the respondents rated their social position as being low (12.6%) or very low (2.2%): 21.5% rated it as intermediate, 56.3% as high and 7.4% as very high.

**Work-life balance**

Very few studies have explored the balance between teachers’ work and personal lives. Cavaco (1993) is one of the few who has documented the intermingling of these two sides of women teachers’ lives and the tensions that often arise between the two (see also Brandão, 1999). The author’s data shows that teachers find it difficult to manage their professional roles without incurring personal and family costs. Her respondents frequently complained about “stealing time” from their own children. The author also notes that in couples where the woman was a teacher, the husband’s professional career was usually given priority over the wife’s.

Loureiro (1997) has shown that the conflict between teachers’ professional and family roles can be a source of physical and psychological problems: the attempt to perform well in both roles may lead to burnout, especially on occasions where there is a coincidence between strong family requirements (e.g., following the schooling of children, or taking care of family members who are ill) and strong professional demands (e.g., experimenting with pedagogical innovations, or going through organisational changes).

Correia and Matos (2001) also documented strong tensions between teachers’ private and professional lives. In the authors’ view, these tensions tend to grow as teachers’ private lives are increasingly invaded by the imposition of administrative tasks that are not accepted by teachers as part of their idealised definition of the profession.
authors stress that this work overload and the gradual dilution of the distance between teachers’ private space and their professional life leads to experiences of “ethical suffering” for not being able to meet students’ needs.

Teacher Development over the Career

The first years of professional experience
In Portugal, teachers’ early professional experiences have deserved some attention from educational researchers (Alves, 2000; Braga, 2001; Cavaco, 1990, 1993; Flores, 1999, 2004; Galvão, 2000; Ponte, Galvão, Trigo-Santos & Oliveira, 2001; Silva, 1997).

In a synthesis of Portuguese research on initial teacher training, Esteves and Rodrigues (2003:23) summarize beginning teachers’ statements about their professional experiences in the following way: (a) a sense that theory is irrelevant for professional practice and that it helps to produce distorted images of educational reality which are responsible for subsequent feelings of disappointment and frustration; (b) the experience of a reality shock, not only because of the abovementioned images, but also as a result of the difficulties that new teachers encounter, especially in their relations with students, the planning of lessons and the management of classroom time; (c) a sense of a weak or null articulation between the institution where teachers are trained and the schools where they develop their practice, which leads to the perception of two distinct training cultures that are based upon different values and that give way to totally distinct ways of thinking about the profession and of being a teacher; (d) a perceived mismatch between the views of different trainers about pedagogical practice, and (e) a devaluation of the period of supervised practice, which is seen as lacking goal clarity and as being inadequately organised.

Silva (1997) conducted a case study of six teachers’ difficulties in their first year of practice. The author characterises this year as a time of “fear and frustration” (Silva, 1997:66). Her findings confirm the results of many studies in the international literature: teachers experience a “reality shock”, they have problems in keeping student discipline in the classroom, they feel isolated, they regret the lack of collaborative work in their school and they feel rejected by their older colleagues.

Flores (1999) has also researched teachers’ first years in the profession. In a longitudinal study of the way 14 beginning teachers changed and developed over a period of two school years (1999/2000 and 2000/2001), the author identified a clash between teachers’ ideal images of teaching and the realities of the work context that they encountered: “ineffectiveness, balkanization, competition and individualism were key issues reiterated throughout the interviews (…), which led these new teachers to adopt a ‘step-back’ attitude and a ‘laissez-faire’ perspective” (Flores, 2004: 305). In face of these realities, most of the participants lost their initial idealism and opted for an attitude of strategic compliance with regard to their workplace.

In an attempt to understand the integration of previous training into professional practice, Galvão (2000) reports a study of three young Biology/Geology teachers. Contrary to other studies, her data suggest an experience of continuity between training at the University and the way teachers used this knowledge in their first years.
of professional practice. However, in a longitudinal study of how two beginning teachers developed or modified their thoughts and actions during their first years as teachers, Braga (2001) found that their initial training had not stimulated an inner process of personal, professional and social maturing; rather, it had been perceived and experienced by the young teachers as merely technical input. In the teachers’ statements and actions, the author identified what she regarded as a manifest lack of reflection about what they were doing and why they were doing it, which she attributes to poor initial training.

In a similar study, Ponte, Galvão, Trigo-Santos and Oliveira (2001) analysed how six young science teachers adapted to their new professional context, how they regarded the influence of their previous university training on their daily practice and what training and support they felt they needed to accomplish their professional projects. The study reports situations where the teachers didn’t identify with the culture of the schools to which they were appointed (e.g., ostracism regarding younger teachers, lack of professional collaboration among colleagues), but also documents cases of easy and successful integration into the institution. Overall, the authors clearly state that “notwithstanding the problems that were detected, this set of cases points more to a situation of success than to one of failure in integration into the profession” (Ponte et al., 2001:41). The study also illustrates the importance of the way schools welcome and deal with their new teachers, an issue that was also explored by Lima (2002, 2003).

**Phases of professional development over time**

In Portugal, there is still shortage of studies on the phases of teachers’ career development. The exceptions are Brandão (1999), Gonçalves (1992), and Loureiro (1997).

Brandão (1999) performed a content analysis of the *curricula vitae* of 141 2nd, 3rd cycle and secondary teachers in Porto who applied to the top rank of the teaching career in the school year of 1992/1993. This group of teachers had entered public teaching in the 1960’s and had gone through all the social, cultural, demographic and policy changes that affected the profession since then. In these teachers’ written materials, the author identifies signs that she interprets as the product of the social and political context of the dictatorship of the New State, the context in which these teachers were born and grew up. As the author puts it, the symbolic universe of this first period of socialisation left its stamp on teachers’ experience of living under authoritarianism: it is visible in their valuing of obedience and compliance, in their association of freedom with disorder and in their difficulty of participating and of innovating in their school. The author stresses that these teachers learned to be teachers as if all classes and all schools were alike, as if the same techniques that worked in one situation worked in all other places and circumstances. Whether or not they rejected the power of these profound experiences, says Brandão, these teachers still manifested these socialisation influences in the way they interpreted their students’ attitudes and behaviour in the classroom and in the playground, in their often intolerant reactions to many situations of change and in their belief that fear and punishment are the most effective educational instruments for dealing with student misbehaviour.
As Brandão (1999) shows, with the advent of the “new school of April”, after the revolution of 1974, there was a system-wide negative reaction to the previous model of schooling, which was seen as socially selective. Education was no longer regarded as transmission, but rather as an instrument of transformation and emancipation. This mutation forced teachers into “a second moment of professional re-socialisation” (Brandão, 1999:93); teaching became a technology at the service of democratic education, which presented teachers with new professional dilemmas.

Gonçalves (1992) studied the career paths of a group of female primary teachers. The participants reported that their “worst years” in the profession were linked to the already mentioned annual applications to a different school. This experience was reported by 61.9% of the respondents, who associated it with being away from the family and the place of residence, in isolated areas where the absence of public transportation and economic difficulties made travelling expensive and almost impossible. Only one quarter of the author’s interviewees didn’t report experiencing any “crisis” throughout their professional career.

Based on Michel Huberman’s work on teacher’s phases of career development, Loureiro (1997) sought to understand teachers’ attitudes and actions in different moments of their career and to see how educational reform reframed their professional paths or interfered with their career cycles. In general, the author confirmed the adequacy of Huberman’s model, as applied to Portuguese teachers’ experience of their career. Interestingly, in terms of relations with students, teachers in Loureiro’s (1997) study who entered teaching before April 25, 1974, reported easier beginnings than those who entered after the revolution. The author also found a considerable proportion of teachers (about a third) who remained in Huberman’s “stabilisation” phase much longer (between seven and 19 years) than the original model had anticipated (two years). Loureiro interprets this as the result of Portuguese teachers’ prolonged attempts to strike a balance between their family and professional lives, and between their work in the school and other occupational activities that they pursue outside of teaching.

Cultures of Teaching and Professional Identity

The dominant professional culture
Despite their sparseness, many studies of teachers’ work are useful for broadly characterising Portuguese teachers’ dominant professional cultures. With few exceptions, the resulting picture is sullen: ritualised practice and absence of critical thinking, predominance of administrative criteria over pedagogical ones, low professional commitment, predominance of training needs that suit the individual and the State, rather than the school and its community, low implication in educational innovations, low use of information and communication technologies, negative and passive attitudes towards educational change, lack of deep reflection on practice, micropolitical tensions within schools, professional isolation, negative attitudes towards the performance of leadership roles, and weak, vague deontology. Cavaco (1990, 1993) characterised the school curriculum in Portugal as a rigid and strictly regulated system. The author notes that teachers implement this curriculum through repetitive and ritualistic practices that they seldom question. Programs of studies are broken down into small pieces, in objectives and contents that are
organised into extremely detailed lesson plans, worksheets and tests that teachers regard as recipes which they saved into a file that is used uncritically, year after year.

Dinis (1997) observed the operation of a pedagogical board in a middle school in Lisboa, in 1995/1996. The board was comprised of 25 members: the head of the school leadership team (who chaired), the vice-president of the team, 21 teachers representing the different subject groups in the school, the coordinator of the class directors and a representative of the parent association. The author found that the mode of operation of the board was mainly administrative, rather than pedagogical. On the other hand, while members made decisions in the administrative area, the pedagogical domain was characterised by the mere channelling of information and by the production of points of view that did not give way to subsequent decision-making.

In Benavente’s (1990) analysis of the discourse of 30 primary teachers regarding the lack of school achievement of their students, the author identified three types of professional implication in their pedagogical work, as professionals: (1) individual intuitive implication (13% of the teachers), whereby discourse was centred on the teacher as an individual, without any reference to institutional or to social issues, or any global reflection on the nature of their school as an institution; (2) denied or impossible implication (50%), whereby the teachers denied any personal implication on the negative results of their students; their discourse focused on aspects that they saw as being out of their reach, such as the Ministry of Education, the parents, the community and “society”; these teachers chose to manage their conflicts, they didn’t take risks, they avoided involvement in innovative initiatives (so that they “wouldn’t have any problems”), and their discourse expressed resentment, and (3) individual and collective, institutional and social implication (only three teachers, 10% of the whole). In this latter case, the teachers where consciously committed to the social and moral obligations their work and aware of the nature of schools as social institutions, they questioned their own pedagogical practices and they looked for ways of diversifying them so as to reach more students.

In a study of teachers’ expressed needs of in-service training, Estrela, Rodrigues, Moreira and Esteves (1998) analysed the responses provided by a sample of 1733 teachers. The authors found that the participants preferred in-service training activities that were directed towards the fulfilment of strictly individual goals and the improvement of personal practice (such as, for example, learning subject matter content, motivational strategies, planning learning activities for dealing with discipline problems, using technological devices in the classroom), rather than activities that were linked to institutional or career goals (such as school and teacher evaluation, or the analysis of educational policy-making). The authors also found lower levels of teacher interest in-service training among older age groups, which suggests the absence of a life-long learning perspective within the occupation.

Ramos et al. (2001) presented the final results of a research study in Portugal that was integrated in “The Learning School” Project, which was developed in the context of the European SchoolNet Project. In the 12 schools that participated in the Portuguese case study (many of which were regarded as “innovative” institutions), the authors found that teachers accessed national and international online networks very infrequently. The main reason that teachers put forward to justify this was the lack of time. More precisely, they argued that (1) teachers’ daily work is very demanding
and time-consuming and the involvement in ICT-supported curriculum projects takes additional time; (2) it is always the same (usually, very small) group of teachers who involve themselves in many (too many) projects, and (3) most of the other school colleagues resist innovation and change. The teachers also mentioned reasons that were related to their school: scarcity of computers, few and overly slow connections to the Internet, poor distribution of the existing connections throughout the building, problems with equipment maintenance, poor circulation of information across the school, insufficient physical space and lack of a school vision of how to integrate ICT technologies into the educational process. Finally, the participants referred to factors that were linked to the educational system, such as teachers’ low job stability, the government’s educational policies, the school’s options on how to manage the time that is available for developing educational projects, the absence of rewards for extra work (which lead to a loss of motivation) and the excessive extension of the programs of studies in many subjects, which took away all the time.

In an ethnographic study of teachers’ professional culture in a middle school, Caria (1999) identified a contrast between a particularly productive teacher discourse at the ideological and symbolical level, and an essentially passive practical action, at the political and institutional level. For example, in the curriculum field, the teachers were extremely critical of the programs of studies that were imposed upon them by the centre, but they refused to develop “collective spaces that might flexibilise the curriculum and recontextualise it in face of the students’ cultural diversity” (Caria, 1999:216). On the other hand, in work meetings, teachers were strongly concerned to reach consensus and to push differences of opinion and clear divergences into the margins, and interaction lacked a decision-making component.

Caria (1999) noted that teachers in the case-study school did not reflect theoretically on the context of their daily work: they did not “rationalise” their action. The author characterises the “ethos” of the professional group on the basis of the following characteristics:

1) Institutional equalitarianism, which prevents collective exchanges of experience from taking place, because they bring to the fore important hidden differences of professional action among colleagues;
2) Formalism, which implies that each does only what is defined in his or her formal role, and nothing else;
3) Humanisation, which expresses a critique of colleagues who only come to school to give their classes, because they do not develop more personalised contacts with their students and do not show concern for their affective and emotional well-being;
4) A sharp division between the curricular and the extracurricular realms. The curriculum is regarded as that which is official, central and scientific, “all of the dimensions of knowledge that are defined in a relation of exteriority to the group”; on the contrary, the extracurricular is perceived as that which is informal and local, all of the dimensions knowledge that are taken as “part of the competencies and the wisdom of the group and which, therefore, define it as a profession” (Caria, 1999:233);
5) The preservation of individual and private spaces, and
6) an overvaluing of the oral aspects of work life in detriment of the written ones – written materials are connoted with the outside, with the impositions of the Ministry. Caria (1999) stresses that the ethos of the group of teachers that he studied was based on structuring principles of action that operated mainly at the implicit level of culture, as tacit and procedural knowledge.
Some researchers have also shown that Portuguese teachers’ attitudes towards educational change are heavily associated with micropolitical processes that occur within schools. Afonso (1994), for example, studied “the interests and the political agendas” of educational actors who were directly involved in a process of mandated reform in the beginning of the 1990’s. The author conducted an organisational case study of a secondary school which was part of a group of 20 institutions that the government had selected to experiment the implementation of a new management model (Decreto-Lei nº 172/91). The school was approached as a political system characterised by conflicts that stemmed from different and contradictory interests and from the use of power to manage these conflicts.

In the case-study school, Afonso (1994) identified micropolitical struggles in which the pedagogical board was used as an opposition platform to challenge the school leadership team and as an instance of “attenuation” of the ruling power of the Ministry of Education over the school, a phenomenon that has also been identified by Lima (1992) in a study conducted in a different secondary school. Afonso (1994) shows that the government’s reform initiatives were interpreted by some school leaders as avant-garde measures that should be imposed upon teachers whom they regarded as conservatives and whose resistance was interpreted by them as a sign of fear that their traditional practices would be disturbed and their group interests threatened.

Cavaco’s (1990, 1993) research also illustrates the existence of informal internal divisions in schools, which privilege tenured teachers (who get the best time schedules and the least difficult classes, and have easier access to resources and to special prerogatives in the use of school space), while “provisional” staff are often ostracized. As the author observes, “[teachers’] work relations are power relations, asymmetric ones, with their own centres and peripheries” (Cavaco, 1990:128).

Alves’ (1999) is another of the few studies that focus on the micropolitical nature of staff relations within schools. The author conducted a case study of school, using participant observation. Alves found that teachers’ actions were founded on “a logic of change that structures itself as a function of the preservation of vested interests and which recurs to the protection of bureaucratic norms to its own advantage” (Alves, 1999:31). The study illustrates, in particular, a struggle for power between teachers and the parents’ association in the school. According to the author, this struggle must be understood within a political and social context which is interpreted by a significant number of teachers as an attempt to take authority and power from education professionals and to deprive them of the exclusive right to govern schools. Because the policy context is interpreted by teachers as an attack to their rights, they react in defence of their territory, which shows that they conceive of education as a zero-sum game in which some win when the others lose.

Another cultural feature that has emerged repeatedly in several studies of teachers is their avoidance of personal involvement in the political-institutional operation of the institution where they work (for example, Caria, 1999). In the schools that have been studied, there seems to be a predominant view which privileges the valuing of teachers’ personal qualities in the performance of coordination or leadership responsibilities and the devaluing of the need of specific training for performing these
functions (see, for example, Sá, 1996, in relation to the role of class director). As Caria’s (1999) study and others indicate, there seems to be a clear emphasis on equalitarianism among colleagues and a refusal to introduce greater uneven levels of power and authority within the profession (Sá, 1996). In the school that Afonso (1994) studied, for example, there was a culture in which the active pursuit of a position in the school’s leadership team was “regarded as improper and opportunistic behaviour” through which some teachers got ahead of their colleagues (Afonso, 1996:203). Moreover, teachers expected members of their leadership team to act mainly as colleagues who were temporarily in charge of the school, rather than as hierarchical superiors or administrators who adopted a technical posture and were insensitive to teachers’ perspectives and demands.

Another aspect of teachers’ professional culture that has deserved some attention from researchers in the last few years is the issue of professional isolation versus collaboration. The few studies that exist show that professional learning communities are a rare thing in Portuguese schools (for exceptions, see Sanches & Cochito, 2002; and Santos, 2002).

The most systematic studies to date on this issue were conducted by Lima (2002, 2004). The author’s case-studies of primary and secondary schools show that collaborative practice is rare, especially in modes of professional interaction that have a practical-work component and that demand greater efforts of coordination and greater levels of interdependence among colleagues. The author has proposed explicit criteria to measure the extent of teacher collaboration in schools and subject departments and has used social network analysis to characterize school cultures in terms of their relational infrastructure (Lima, 2002). He has also shown how the absence of in-depth collaborative relations in Portuguese schools compromises the official goal of school autonomy and professionals’ own aim of implementing teacher-led and school-based curriculum development (Lima, 2004).

Caetano (2003) describes a three-year study that documents the efforts of a head of a primary school to change the operation of her school’s structures in favour of a more collaborative approach among teachers. The head believed that teacher resistance to change could be overcome through the imposition of more interaction among them. For this purpose, she launched an attempt to make two teachers who shared the same group of students work more interdependently in their classroom and in their extra-classroom activities. The attempt failed because the teachers didn’t recognise the change as theirs and because interpersonal relationships between them were negative. As the author notes, these difficulties made the head of school understand that teacher interaction is not necessarily synonymous of cooperation and school change. Although Caetano claims that over the long run the collaboration that was initially forced upon the teachers by the head of school transformed it into a real collaborative institution, she does not present convincing empirical data to support this allegation.

A particularly interesting work that documents the many forms and meanings that teacher “individualism” may take in schools is Correia and Matos’ (2001; see also Correia, 2001). According to the authors, the difficulties that teachers face in coping with the dissociation between their private lives (including the private – i.e., isolated – experience of the profession) and their professional ones give way to a set of “defensive professional ideologies” which constitute “modes of managing conflicts of
professional responsibility and of keeping professional suffering within tolerable limits” (Correia, 2000:29). The authors refer to these ideologies as “new forms of professional individualism”, which in their view are distinct from the “classical professional individualism” which allegedly predominated in the teaching profession until around the mid 1970’s. According to them, while “classical” individualism was grounded on an epic conception of the profession, a strong and shared spirit of mission and continuity between the person and the professional, the “new individualism” is grounded on the continuous experience of professional and ethical suffering.

Correia and Matos (2001) identified four “defensive professional ideologies”. The first is institutional individualism. In this ideology, teachers cling to an idealised definition of schooling and attempt to protect it from the “contamination” of external forces such as students’ social characteristics and the interference of the Ministry of Education. Teaching is regarded as an eminently intellectual and introspective activity whose purity is threatened and violated by the social contexts with which educational work takes place nowadays. Therefore, teachers try to preserve the “pure” traditional values that allegedly characterised the golden age of schooling. This ideology is expressed often by teachers who accommodate themselves to the current state of affairs, who retreat from action because they see this as a way of protecting their mental sanity in face of what they regard as deteriorating teaching conditions.

The second ideology referred to by the authors is inspired voluntarism. This ideology is developed in opposition to institutional individualism. Its source of inspiration is the “need to fight routine”, expressed in efforts to strengthen and to value individual initiative will. Most of those who share this ideology tend to think that the current crisis in education is mainly a crisis of leadership.

Correia and Matos’ (2001) third defensive ideology is had a domestic-affective character. This ideology is constructed around the belief that schools are natural family-like communities. Therefore, pedagogical authority should not be grounded on institutional factors, but rather on moral ones, such as personal respect, loyalty and compliance with the rules that have been agreed-upon as a common space for action. Teachers who regret the absence of this communitarian warmth experience the profession bitterly; they may not always leave teaching; rather, they maintain a discrete and anonymous presence in their workplace.

Finally, contrary to the others, teachers who share an ideology of critical interventionism value the organisational dimension of their work and show concern for the effectiveness of the system and for the quality of their own professional performance. For those who share this ideology, the main problems of school education are the result of poor teacher training and of the lack of proper evaluation of the whole educational system.

Commenting on these results, Correia (2001) emphasises that all these ideologies have one thing in common: an individualised relation with the profession and with work contexts. Only in the case of critical interventionism is the organisation put into question, but even here teachers do so by denouncing adverse external forces, rather than by constructing a collective project that attempts to materialise their own utopia.
One last area of teachers’ professional culture where a few studies have concentrated their efforts is deontology. Silva (1997) sought to determine the deontology that is implicit in teachers’ exercise of their job and the domains into which it can be organised. The author interviewed 36 teachers in different phases of their career in two middle schools located in Lisbon. Silva found that the teachers defined teaching mainly as an ethical activity, but they expressed caution as to whether it was possible or even desirable to subject their work activity to an explicit deontological code that was common to all teachers. Moreover, teachers were seldom in favour of a written code; they preferred individual, inherent and implicit codes of conduct.

A similar study was conducted by Seiça (1998), who interviewed eight teachers with different levels of work experience in two schools in the Portuguese capital. The participants tended to emphasise the importance of teachers’ self-determination, although they admitted that hetero-determination might also be a positive thing, as long as it was filtered through each individual’s consciousness of duty and worldview. The great majority of the interviewees favoured the creation of a deontological code for the profession, which they thought could be useful as a source of uniform criteria that could be used to judge the adequacy of teachers’ actions. Although many of them thought that teachers’ deontological code should be structured around very general principles, without the explicit statement of specific duties, half of the group thought that the code should establish clearly which teaching practices were correct and which ones were inadequate, which seems to be contradictory with the defence of a generic code. Another interesting result of this study was that teachers who were more advanced in their career referred more frequently to teachers’ values and duties, while those who were on its initial stages showed were more concerned with the programs of study of their subjects and with pedagogy and didactics. This result suggests that teachers may develop a greater awareness of the ethical dimensions of their work as they accumulate more years of service.

Finally, in a study that involved interviews with 10 secondary school teachers, Seiça and Sanches (2002) sought to understand if it was possible to find a common ethic in teachers’ representations of their professional practice that could be used as a foundation for an ethical code for the profession. In teachers’ statements about their work activity, the authors identified a set of deontological domains which they categorised as nomothetic, axiological, social and ideal. The dominant level was the nomothetic, which comprised professional and institutional elements. The teachers emphasised, above everything else, the importance of compliance with the laws that regulated their activity and with the internal rules that were established by their school and by their own subject group within the institution. The authors interpret this pattern of responses as “the secular effect of a persistently centralised educational system” (Seiça and Sanches, 2002:65). In fact, teachers’ statements suggested that the State was the primary and official interpreter of the common good and of the essential goals of schooling. This emphasis on the legal determining factors that impend upon teachers’ professional action suggests that the teachers believed that there was an external power that provided and guaranteed the ethical foundations of their work activity.
Teachers’ responses to educational reform

It is in research on teachers’ reactions and responses to state-mandated educational reform that we find more direct evidence of the effects of restructuring policies on their work and on their identities as professionals. However, not all of this research is explicitly concerned with the consequences of state policies at these levels. Rather, it intends mostly to analyse and criticise the dominant “top-bottom” model of policy-making in Portugal. Nonetheless, it is possible to find in many of these studies evidence of the consequences that these measures have for teachers’ lives. These studies cover many different aspects, such as systemic reform, the implementation of new curricula (for example, new programs of studies, new curriculum areas, “alternative” curriculum formats), changes in school management structures, new systems of student assessment, new organisational formats for the in-service of teachers, innovative models of school organisation (such as “basic integrated schools”), and the introduction of learning centres in educational organisations.

Caria (1995a) conducted an ethnographic study that sought to understand how teachers in a middle and secondary school reacted to the implementation of educational reform. The author found that teachers felt that the reform legislation was out of touch with their actual work context and with the conditions of their professional practice. The teachers expressed perplexity, insecurity and disorientation in the face of the new reform initiatives. According to the author, these feelings were a consequence of their experience of powerlessness and of their sense of having been excluded from the decision-making processes that were behind the reform. The teachers regarded many aspects of the new state policies as ambiguous and unclear. The apparent gaps and the uncertainties that they perceived in the new legislation were interpreted by them as “traps” or as “momentary distractions”, rather than as “spaces of formal or informal power” that could be used to their own profit (Caria, 1995a:335). They coped with the perceived ambiguity of the reform initiatives by acting in three complementary ways: focusing on the present, acting under the pressure of events and following orders. In another paper, the author stresses that teachers’ main modes of response to educational reform were defensiveness, acquiescence and resistance, all of which inhibited their collective action (Caria, 1999).

In a study conducted in a secondary school in the centre region of Portugal, Loureiro (1997) used the auto-biographical method to understand how 30 teachers responded to official pressures towards reform. The author’s results were quite different from those of Caria (1995a, 1999). Indeed, although about one quarter of the participants stated that the reform wouldn’t have any impact on their career and a small number admitted that it provoked in them strong feelings of dissatisfaction and important professional “crises” (because it faced teachers with “new problems, more complex tasks, increased responsibilities and new apprehensions and concerns”), a high number viewed reform as a challenge that might stimulate the scientific and pedagogical “renovation” of their usual ways of working (Loureiro, 1997:149-150). Therefore, the great majority displayed a clearly favourable attitude towards accepting the changes that were proposed centrally. However, the teachers in general were also sceptical and disappointed with the actual materialisation of the reform initiatives and they blamed the central administration for not having cared for the conditions that would make real change possible in schools. In particular, the
teachers complained about the lack of support and the absence of in-service training that might help them adequately implement the reform.

Fonseca and Antunes (2004) researched twelve 3rd cycle teachers’ pedagogical discourse in relation to the regulating discourse of the educational reform that was launched in Portugal in the beginning of the 1990’s. The concept of “regulating discourse” was taken from Basil Bernstein’s (1996) sociological theory to refer to the discourse that conveys the legitimate values, attitudes and personal and social competencies that are endowed officially. In the case of the abovementioned reform, this discourse emphasised, among many other things, the promotion of student personal and social skills that would enable them to develop their whole personalities and contribute to social progress and to the democratisation of society. The study also used Bernstein’s notion of recontextualisation to refer to processes whereby teachers’ pedagogical discourse and practice selectively appropriate, reframe and refocus official reform discourses. In teachers’ responses to their interview questions, the authors found “diverse degrees of approximation and/or distancing from the legitimate text of the reform”, “distinct degrees of coherence” and “different degrees of recontextualisation”. Overall, the data indicated that teachers held a general orientational disposition that was favourable to the reform’s regulating discourse, but their actual performance as educators showed little convergence with that discourse.

The curriculum is another area where teachers’ reactions to the introduction of centralised, mandated educational reform have been studied in some depth. Brazão and Sanches (1997), for example, conducted a case study of a secondary school in Lisbon to investigate the institutionalisation of the new curriculum that was introduced in Portuguese schools as part of the global educational reform that was launched in the second half of the 1980’s. The majority of the eleven teachers that participated in the study viewed this reform as an opportunity to update the programs of studies of the subjects that they taught, but very few saw in it an opportunity to change their pedagogical attitudes. The authors report that a group of teachers experienced an initial phase of “enchantment” with the reform, which was characterised by a lively climate of participation in meetings and of active reflection on the educational and the curriculum perspectives that underlay the principles expressed in official reform documents. These teachers expected that the reform would create the conditions that would allow them to innovate, to experiment and to reconstruct their pedagogical practices.

The participants valued three main aspects in the reform: its inclusion of educational goals that were oriented towards students’ personal and social development, its promotion of the practice of interdisciplinarity (through the introduction of a new curriculum area called the “school area”), and the introduction of a new assessment system that emphasised the formative assessment of students’ work. Of all of these, teachers’ greatest expectations focused on the “school area” (a new curriculum space that was to be devoted to the integration of curriculum subjects and would serve as a bridge between students’ school experience and their social life), although some teachers regarded it mostly as a set of activities aimed merely at students’ social development, rather than as a space for integrating subject knowledge from different curriculum areas. The researchers’ data show that teachers’ practices in this and other innovative areas were constrained by “the hegemonic power of the disciplines” (Brazão and Sanches, 1997:81).
Moreover, despite many teachers’ positive expectations, the implementation of the new curriculum disappointed them. Many felt that the only change that had really taken place was in the content of the programs of studies. According to the authors, this disconnection between teachers’ initial expectations and their views about the results of the actual implementation of the reform was due to three types of factors (Brazão & Sanches, 1997: 83):

1) **Institutional factors.** These comprised three aspects: the publication of subsequent legislation that teachers regarded as contradictory with the general principles (such as, for example, the primacy of formative assessment) that had been announced earlier, the lack of training that would teach them “how to employ” the new methodologies and the new forms of assessment that were officially sponsored, and the national dissemination of the reform, without a previous evaluation of its experimentation in a restricted set of schools;

2) **Organisational factors.** These referred to specific conditions of the schools where the teachers worked that hampered the implementation of educational reform: the physical structure of the building (which was overcrowded with students and lacked space for meetings), the absence of didactic materials and laboratory equipment, and the usual mode of operation of teacher groups (which met infrequently and dedicated most of their time to the annual planning of subject matter, rather than to pedagogical issues, which were left to the discretion of each teacher).

3) **Curriculum factors.** In this field, teachers emphasised the vast extent of the programs of studies, which was seen as the major obstacle to changing their teaching practice, and the poor vertical and horizontal coordination between these programs.

Brazão and Sanches (1997) concluded that institutional, organisational and curriculum aspects of school life negatively influenced not only the meeting of teachers’ initial expectations, but also their actual teaching practices, which, instead of changing in the officially desired direction, became defensive and often even more conservative than they were before. Indeed, as the authors show, the tensions that were created by the different versions and legislative segments of the global reform, and between these and the organisational and curricular contexts of school life, made teachers adopt “logics of pragmatism and of adaptation” (Brazão and Sanches, 1997:90). Sometimes, these adaptations represented real experiences of symbolic violence: in choosing to comply with the reform’s demand for the full coverage of the programs of studies, for example, many teachers sacrificed their own preferences and pedagogical beliefs.

Morgado (1999) conducted a study of teachers’ perceptions of school curriculum autonomy and discussed the role of central administrators, schools and teachers in its construction. The study involved a representative sample of 311 teachers lecturing in the 2nd and 3rd cycles and in the secondary level of schooling in Bragança, in 1996-1997. The author came upon a restricted conception of school among his participants: most of them (59 %) perceived school autonomy almost exclusively at the level of school management, rather than at the curriculum level. Moreover, teachers depended strongly on directives coming from the Ministry of Education with respect to the management of their programs of studies: 63% believed that the curriculum guidelines that were produced by the Ministry (methodological suggestions, proposals for classroom activities) were crucial to their management of the program. As the author notes, this shows that teachers still take refuge in methodologies that are
proposed by central administration and adopt a normative view of program coverage, instead of looking at programs of studies as flexible learning projects that can be adapted to their contexts and to their students’ needs.

Morgado (1999) was particularly interested in understanding if teachers took advantage of the real opportunities that are offered to them by the state’s legislation on the management of the curriculum. He found that the majority of participants (68%) felt that they already disposed of a considerable margin of autonomy in this respect and that 61% agreed that teachers chose their textbooks from a list of publications previously selected by the Ministry of Education. Additionally, 81% stated that their curriculum practices were facilitated by the official definition of curriculum objectives and of subject matter contents that was communicated to them by the central administration.

The already mentioned “school area” was the target of specific research interest from Branco and Figueiredo (1992), and Caria (1995b). Branco and Figueiredo (1992) collected data on this issue in a school organisation during the school year of 1991/1992. They found that many teachers complained about the initial climate of confusion regarding the exact nature of this new curriculum area. Their specific complaints focused on the lack of official information and the absence of specific training for the purpose of working in this area. The teachers also felt that the school area demanded a lot of commitment from them and many extra hours of work that were beyond teachers’ normal schedule. The authors also found that participants had reflected very little on the nature and the real potential of this curriculum innovation. The ineffectiveness of communication between the Ministry and the school and within the school itself generated a climate of uncertainty and ambiguity that increased the likelihood of information distortion about the issue. Moreover, the actual implementation of the school area in the institution made it clear that this was not something that the school had wished for, but rather a mere response to a hierarchical imposition. Therefore, while the school area formally implemented by the school, it was not regarded a high priority and teachers invested very little in it.

In 1992/1993, Caria (1995b) conducted an ethnographic study of a school which illustrates the various modes of appropriation and the symbolic conflicts that arose in response to the school area innovation. The author stresses that teachers discovered “the practical meaning of the school area” not on the basis of its legal definition, but rather on the basis of the structure of their own pedagogical practices and conceptions. Moreover, teachers’ “strategies of appropriation” (Caria, 1995b:58), of this imposed innovation were themselves diverse: they differed as a function of the diversity of their practices and of the representations that they had already developed before the school area was implemented.

As Caria (1995b) notes, potentially, the school area could increase students’ involvement in school activities, providing them with a meaning (linked to their social and material conditions of existence) which could be invested in their school life. Likewise, it could break the segmented discipline-based character of the school curriculum, through interdisciplinary and contextualised work. Both of these virtual realities might strengthen the school’s links to its community, which was a major publicly stated goal of educational reform.
However, Caria (1995b) found that the teachers viewed the school area as a direct competitor to their own disciplines and feared that the time that they would devote to it might undermine the covering of the whole program. In an attempt to decrease the risk that this might happen, teachers tried to think of the activities and the themes that they were supposed to develop in the school area as a direct function of the things they had were already doing in their own disciplines. Therefore, their participation in the school area was structured around regular classroom subject-based activities, which subverted the potential curriculum integration of this innovation. The author critically observes that there is something contradictory about teachers wanting to assert their autonomy in relation to the Ministry of Education, but at the same time assuming the need to fully cover the programs that are produced by that Ministry, which only shows how far they have internalised the government’s administrative control over their practice.

However, not all studies of official curriculum reform report such negative results. A good example of a more positive evaluation can be found with respect to another area of curriculum reform that has caught researchers’ attention: the official creation of “alternative curricula” for at-risk students. These are curricula that are designed locally to meet the needs of particular groups of students who have failed in all other attempts to instruct them according to mainstream models of schooling. In this respect, Branquinho and Sanches (2000) conducted a case study of a school located in the periphery of Lisboa which involved seven teachers who were teaching these curricula to 2nd cycle students between 1994 and 1998. The study aimed at identifying and analysing teachers’ conceptions of these curricula and understanding the changes that it had introduced in their own educational conceptions. An interesting result of the study was that participants regarded teachers’ human qualities as more important for student achievement in this curriculum area than their academic or scientific knowledge, which was considered of secondary importance. The authors’ data also show that the participants developed their own teaching and learning strategies, contextualising their teaching practices and adjusting them to the characteristics of their students. In particular, they developed teaching methods that allowed the students to perform an active role in their own learning. The authors conclude that the “alternative curriculum” initiative helped renovate the school and successfully integrated students who were at risk of prematurely dropping out of the educational system and of sliding into social marginality.

One of the areas of state-mandated reform where more research has been conducted is the reform of the management model of Portuguese schools that was launched in the beginning of the 1990’s. With this reform, the central administration aimed at achieving two fundamental goals: to improve the efficiency and the administrative effectiveness of the system, and to ensure schools’ responsibility before the Ministry and their own communities. To achieve the first end, in 1991 the government instituted a new role in the leadership of schools: the “executive director”, a professional manager (nominated by a school board) that would replace the previous leadership team (which was comprised of around four members and was elected by the teachers) and was supposed to guarantee the daily management of the school. With the second purpose in mind, the government changed the composition of school governing bodies (by instituting, for example, the creation of a school board where new partners were represented – namely, parents and representatives of the school’s
community – and which allowed for the public scrutiny of the institution’s internal decision-making processes) and expanded schools’ institutional autonomy.

Silva and Falcão (1995) report a multiple-case study of school organisations that analysed the process of change that occurred as a result of these. The authors found that the schools had produced all the internal regulations that were mandated by the new law. However, the teachers perceived this production mainly as the fulfilment of a legal requirement, rather than the actual exercise of their right to autonomy (as one of the interviewees put it, “our problem is that we have autonomy, but we cannot go against existing norms”) (Silva and Falcão, 1995:73). Therefore, teachers didn’t regard themselves as “producers of norms”; they felt the need to justify every innovation that they came up with by alluding to its legal legitimacy. The teachers didn’t seem to realize the margins of liberty that the new model of school management allowed and were unable to relate the formal notion of school autonomy with the notion of actual participation: they wished to become more autonomous from the state, but were unable to free themselves from centralised traditions and lived in a permanent tension between schooling as reproduction of norms and schooling as production of these norms.

In a different study, Afonso (1994) shows how the government-sponsored reform of the management of schools was criticised and feared by teachers and teacher unions as an attack to the democratic governance of schools which, until then, lay exclusively in their hands. In the secondary school that the author studied, teachers were hostile to the official reform. Most of those who were interviewed were either in open opposition to it, or at least, cautiously sceptical. Most expressed suspiciousness regarding the official avocation of the participation of new partners in the governing of the school. Teachers were cautious and sometimes even openly negative about parent participation in the management of their institution. They only expected and accepted explicitly modes of parent participation that didn’t defy their traditional status and their interests within the political system of the institution. As to the new role of the executive director, they expressed fear that the new legislation would allow the school to be led by someone from the outside, who was not a teacher of the school and who did not understand teachers’ interests.

Mota’s (1996) study of teacher attitudes towards the participation of new actors in the governance of the school reached similar conclusions. In a survey of eight schools in Lisbon, the author found that teachers were generally unsympathetic to the idea of having parents participate in the administration of the school. These attitudes were especially negative in areas such as decisions on student retention, the evaluation of teachers’ performance, the accomplishment of program contents and the organisation of classes. These domains were regarded as the exclusive prerogative of the teaching staff. The most favourable opinions were expressed in relation to issues such as parent participation in the organisation of parties, field trips and similar events.

A further example of a deeply teacher-centred conception of schooling is provided by Freire’s (2004) study of the “school assembly”, a formal body that was introduced in 1998 to replace the previous “school board”. Legally, teachers in the school assembly can represent a maximum of 50% of all members, and the chair must be necessarily a teacher. In all of the 11 schools that Freire studied, this maximum had been reached, and in three of them it was even exceeded! On the other hand, while the legislation
stipulates that parents should represent a *minimum* of 10% of all members, most schools had settled exactly for that number of parent representatives. Freire concludes that teachers’ actions denote a clear depreciation of the representative character of the school assembly. The author’s data also show that 82% of assembly chairs felt that their participation in the assembly represented additional work without the necessary rewards. Finally, of all groups that participated in the assembly, teachers were the most sceptical about its influence on the quality of education provided the school: more than two thirds stated that this innovation did not improve or worsen it (see also Falcão, 2000).

One of the many new measures introduced in the school autonomy laws of the late 1980’s and in the new models of school management of the 1990’s in Portugal was the need for schools to develop their own development plans (called “school educational projects”). Fontoura (2001) studied how schools in the metropolitan area of Lisbon constructed these projects between 1991 and 1994. In particular, the author focused on the way teachers processed the information that they had about their context and the operation of their school, and how they made decisions on the basis of this information processing. In the projects that the author analysed, there were no underlying visible processes of negotiation between the school actors that comprised the school and its community, in order to define priorities and to build compromise platforms between the various groups (teachers, students, non-teaching staff, parents and other members of the community). Moreover, instead of defining precise objectives that were associated to concrete actions and to explicit timelines, most projects constituted a set of “descontextualised desires”. The projects didn’t seem to clarify school goals or to point to precise areas for autonomous action and improvement. There was also no definition of operational strategies in these documents. Furthermore, the schools’ yearly activity plans were constructed mainly on the basis of proposals made by the different subject groups: they were lists of unconnected activities, rather than coherent school plans. In short, school educational projects were regarded by teachers mostly as exogenous documents that had little to do with their daily life in schools: they were ‘untrustworthy fictions” (Fontoura, 2001:135) which were regarded as unnecessary for the development of their regular educational action.

Estêvão, Afonso and Castro (1996) also analysed the educational projects, activity plans and internal regulations produced by 44 schools that were experimenting the new management model that was legislated in 1991. A relevant find of the authors’ study was that there was a “curricularisation” of these educational projects: for example, they were regarded by teachers as ways of accomplishing the objectives that were officially mandated for the school area, without a global coherent project for the whole curriculum of the institution. Secondly, these projects were often generated by very small and restricted groups of teachers, with the exclusion of students, parents and other relevant actors. Finally, there was a lack of guiding principles in these texts: most were devoted to the diagnosis of the current situation of the school (mostly, a “characterisation of the context”). In the schools’ activity plans, the authors also identified “a strong presence of the disciplinary reference” (Estêvão et al., 1996:37), at the expense of an interdisciplinary conception of schooling. These plans centred mostly on curriculum complement activities, many of which were developed only by individual teachers. In a global analysis of their findings, the authors conclude that “the documents don’t seem to really express or characterise a
school”: they are rather an “instituted innovation” (Estêvão et al., 1996:54) that has not been internalised or genuinely adopted by teachers and that does not express any single claim from them for the recognition of their singularity.

Another measure that was introduced in the context of the new model of school management was the creation of a “global hour credit” that was conceded to schools upon request, so that they could manage it independently, according to their internal needs and to specific functions and projects beyond classroom teaching. In 1999-2000, Silva (2004) studied 67 schools in the Algarve, in order to understand how institutions used and managed this credit. The goal was to study the way schools used the margin of autonomy that the law offered them in this respect. The author identified cases of schools where the credit was used to feed an “autonomy of transgression” (Silva, 2004:216): it was used to solve pressing problems that were not anticipated or integrated by the legislation that created the credit. On the other hand, the teachers who were in charge of the management of their schools felt that their strategic options were strongly constrained by the strict official regulations that stipulated how the credit could be used. However, in spite of these constraints, the credit was perceived as an instrument that potentially promoted the exercise of school autonomy. Silva also identified the exercise of strong bureaucratic control by the regional administration as to how schools used the credit, which seems to be contradictory with the constant official rhetoric of school-base management.

The global educational reform of the 1990’s also entailed the introduction of a new system for assessing students’ school work, in 1992. Teachers’ responses to this system were analysed in depth by Afonso (1998), who collected data in 1993/94, in two schools, one in Braga and the other in Porto. The author discovered that although the new legislation rested on the belief that all students could learn, around half of the teachers who participated in the study disagreed with the statement that “all students are capable of meeting the minimum objectives in each discipline”. Similarly to what other authors have found, Afonso’s respondents also displayed a generally adverse attitude towards parent participation in student assessment, which was one of the most innovative aspects of the new legislation. For example, 88% considered that “parents are not prepared to collaborate with teachers in the assessment of their children” (Afonso, 1998:294). On the other hand, despite the fact that the legislation that advocated a strong emphasis on formative assessment had been in place for nearly two years, 59% still admitted that this form of assessment was rarely practised in their school. Also, teachers had not reflected sufficiently on the central issues that the reform of the assessment system rose in terms of their work practice and on the implications that it might have for their autonomy as professionals. Besides, 74% admitted that the new system was still relatively unknown for the majority of teachers (see also, Bianchi, 2002).

Another innovative educational initiative that was introduced in Portugal in the 1990’s was the creation of Teacher Training Centres organised and managed by networks of schools. The results of this innovation have been investigated by Ruela (1998), who studied the processes of construction of the training offer of four Training Centres between 1993 and 1995, looking closely at how the in-service training that these institutions offered articulated the national training priorities defined by the government with schools’ and teachers’ own training needs.
Ruela (1998) considered two levels of training offer: the national and the local. The national level gives priority to the link between teachers’ in-service training and the goals of the educational system, namely, the development of national educational reform. Therefore, training is not conceived in terms of teachers’ professional development needs or of the organisational development of schools, but rather as something that is to be articulated with the change strategies that are defined by the central administration. Its main goal is to persuade teachers to become reform agents and to “recycle” them, so as to make them internalise the technical skills that are demanded by reform. On the contrary, local level training regards it as a component of endogenous teacher and school change processes and emphasises a school-centred conception of teacher learning. It was precisely to promote the latter perspective that these centres were institutionalised.

However, Ruela’s (1998) results show that the internal operation of the centres and the nature of the relationships that they established with several educational partners and with the Ministry of Education did not contribute to the kind of in-service training offer that would link teachers’ training needs to the needs of their institutions. Contrarily to participants’ expectations and to the very guiding training principles that had been defined by these centres, the training that they offered was clearly oriented towards responding to needs that were created by the evolution of the educational system as a result of state reform. The training was directed to teachers as individuals and was structured in a traditional decontextualised mode that was decentred from the school. These results converge with findings of previous (Barroso & Canário, 1995; Ferreira, 1994) and later (Barroso & Canário, 1999) studies on the same issue.

Another official measure of educational reform was the creation of Basic Integrated Schools (BIS). These institutions represented a new model of school organisation in Portugal that brought together several levels of education under the same school, the same senior management team and the same educational project. Its official aim was to provide pupils with continuity and coherence in their experience of schooling, from kindergarten until the end of compulsory education (grade 9). A study conducted in 1992/1993 by Hespanha, Cibele and Góis (1993) in the 26 BIS that existed at the time in Portugal found that in 58% of them, teachers were enthusiastic about the new model, in 23% they were indifferent to the innovation and in 15% their reaction was overtly negative. However, while some of the schools were starting to rehearse some form of curriculum articulation among the three cycles of basic education (as predicted in the reform), there was still no joint work among teachers from the different cycles for analysing their respective curricula and programs of studies, with a view to integrating their work sequentially, in favour of the continuity of students’ learning.

In another study of teachers’ professional cultures within this new model of school organisation, Rodrigues (2004) used Lima’s (2002) concepts of range, frequency and breadth of interaction to study teachers’ professional relations across the different cycles of education that coexisted in two BIS, in 2002. The author found that there had been an increase in the level of teacher collegiality within the internal governing structures of the schools as a result of the implementation of this model, but her data show that in-service training was still organised on the basis of a separation between cycles and disciplines, and that there here had been few changes in the level of articulation between teaching staff of the different cycles. Although most staff
recognised the importance of professional collaboration for their own professional development, most admitted that this was not usual practice in their school. In either of the schools, teachers interacted professionally, on average, with less than 8% of their school colleagues and at least half of them had not developed any kind of practice-oriented joint work with a school colleague, or had not participated in any common project with other teachers in the school. Contacts between colleagues from different cycles (one of the official features of the BIS) were scarce, especially between 3rd cycle and secondary teachers, on the one hand, and their colleagues working in the lower levels of schooling in the institution.

Finally, based on results of empirical studies conducted in 1991 and 1992, Canário (1994) discussed teachers’ reaction to a specific innovation that was officially introduced into Portuguese schools: the creation of resource centres. While in the beginning of the 1980’s, in countries like Australia, Japan and the U.S.A., at least 85% of all schools in the post-primary sector had a learning centre and several European countries had substantial proportions of these (43% in France and 100% in Switzerland), Portugal had none. Canário’s aim in the critical analysis of the abovementioned studies was to highlight ‘the risks and the limits of a formalist and ‘vertical’ strategy of change’ that ignored or devalued ‘the relative autonomy of local change dynamics’ (Canário, 1994:93).

The official aim of the creation of leaning centres in Portuguese schools was to help transform teaching practice and to ensure that students were offered learning opportunities that developed their research, self-training and autonomy skills. As Canário (2004) observes, the introduction of such an innovation into a school represents a change that can have far-reaching organisational implications for all aspects of school life. To take profit of the full potential of this kind of innovation, schools must the able to act autonomously on the basis of an educational project of their own.

The data analysed by the author show that this was a difficult process for the schools involved. Most regarded the learning centre as just another innovation among many others, and did not articulate them together in a coherent way which might express a global institutional educational project. A second significant result was that learning centres became supplemental to the more “noble” curriculum activities (the subjects, classroom teaching). Teachers tended to view these centres as mere “enrichment” resources that the students could use in their spare time, outside “regular” classes. Therefore, the centres were weakly coupled with traditional activities which were seen as the “core” of teaching in the school. Finally, many teachers viewed the use of these centres as add-on to the work overload that they were already experiencing. Therefore, they committed themselves very little to this innovation.

The construction of professional knowledge
In the field of curriculum studies in Portugal, there has been a remarkable development in the quantitative production of academic literature, especially in the number of essays and conceptual discussions, but there is a huge void in terms of empirical research, as one may easily verify by reading a recent review of work produced in the field (Pacheco, 2002). The literature is particularly lacking with respect to how teachers experience and construct the curriculum in context, as professionals.
Caria’s (1997) ethnographic study of teachers’ curricular cultures in a 2nd and 3rd cycle school between 1992 and 1994 is one of the few exceptions (see also Caria, 1999, 2002). The author’s goal was to identify mathematics teachers’ understanding of operations such as the selection, organisation, transmission and evaluation of knowledge in their teaching of the subject. Caria used the concept of “curricular culture” to understand how teachers contextualised so-called “scientific” subject matter knowledge, in a given classroom space and time, so that students could learn it. In this study, the curriculum was not understood as a written and formal text that organised the knowledge contained in the program of studies, but rather as the real curriculum that was actually constructed and developed in the classroom by the teacher. In other words, the curriculum was taken as “the teacher’s understanding (the doing and the knowing) of the knowledge that she teaches when she approaches the students, mixing scientific and pedagogical elements, so as to serve the daily activity of the classroom” (p. 60).

In the case-study school, Caria (1997) found four types of mathematics “curricular cultures”:
1) A “culture of execution”. This culture expressed “the total subordination of teaching to the purposes of central educational policies” (Caria, 1997:71). In it, teachers regarded themselves as mere executors. They emphasised program coverage, viewed the curriculum as a fixed sequence of contents, privileged student memorisation of facts, repetition of exercises and the mechanisation of learning, and showed little concern for the “application” of mathematical knowledge to real-life situations;
2) A “culture of mitigated execution”. As in the former, in this culture there was a view of mathematics as a temporally ordered sequence of contents that the students should assimilate. However, here, teachers attempted some conciliation between the mechanisation of learning and memorisation, on the one hand, and the student’s sporadic understanding of fundamental notions which were regarded as vital for his or her future learning;
3) An “instrumental culture”. In this case, teachers attempted to turn mathematics into a resource that students could use, to their own profit, in their future life in school and outside school. For this reason, they were not too concerned about covering the whole program, as in the former types of culture, and were thus more selective as to which contents were more relevant. However, these teachers also acted as technicians: they chose the means, but refrained from deciding about the ends of education;
4) A “conflict culture”. This was the one culture where teachers experienced more conflicts between institutional demands (such as covering the whole program) and students’ learning needs (e.g., understanding mathematical notions and applying them to real life situations). It was also the culture in which teachers respected the least the presumed temporal ordering of program topics and in which they looked for ways of flexibly managing the curriculum on the basis of their own decisions and choices, according to their own definition of learning priorities.

Another relevant study in this area was conducted by Caetano (1998), who conducted interviews with 2nd, 3rd cycle and secondary teachers in a school located in Lisbon. Caetano asked her respondents to report professional situations which they had experienced as dilemmatic. In a second phase of the study, she interviewed eight of
the teachers who stated that they still had not resolved their dilemmas. The author’s results show that teachers used predominantly intuitive processes in the resolution of their professional dilemmas, with recourse to non-reflective procedures. Moreover, many dilemmas remained unresolved, which Caetano regards as evidence that teachers’ thinking was contextualised, in the sense that the decisions that were made were not regarded as valid for every situation. Teachers often made decisions without feeling that a real solution had been reached. There were even cases where the dilemmas were recurrent and with relation to which teachers reported that they made decisions on a case-by-case basis. Here, the specific localised dilemmas might be solved, but the broader underlying dilemmas persisted. The fact that most of the dilemmas that the author identified (64.9%) were not resolved didn’t prevent teachers from acting and making decisions.

A final set of studies that is relevant for understanding Portuguese teachers’ construction of professional knowledge is a line of research focusing on History teachers’ conceptions of their subject and of the teaching of it (Magalhães, 2002; Santos, 2000). Magalhães’ (2002) study, in particular, shows how teachers’ conceptions of History are tied to their conceptions of the teaching of the discipline as a school subject and to their actual teaching practices in their schools.

Magalhães (2002) conducted a survey study with 3rd cycle and secondary school teachers in Alentejo, in the school year of 1998-1999. Respondents were asked to express their degree of agreement or disagreement with 16 statements that corresponded to the following “theoretical groupings”: positivist views of History (for example, History “should tell things as they really happened”), views associated with school of the Annales (e.g., History’s task is one of “comprehension, rather than explanation”), relativist perspectives (e.g., History is “historians’ report of what they think has happened in the past, interpreted in the light of their prejudices and opinions”), views which deny History a scientific character (e.g., “it can only be plausible, but never objective”), sociological perspectives (e.g., “it’s a powerful mean through which groups and people define their identity”) and Marxist versions (“it’s a social science that focuses on human activity in a given space and time”). The questionnaire also included 30 statements which teachers were invited to rate and that related to issues in the teaching of History, such as the construction of historical knowledge in the classroom and historical cognition. Finally, the author mapped the types of actions that teachers said they developed in the classroom when they taught History to their students.

Magalhães’ (2002) findings show that teachers rejected conceptions that denied History’s status as a scientific discipline, and relativist views that challenged the unity of historical discourse. They constructed History as a methodologically rigorous discipline that relied on access to primary sources as a necessary condition for the production of scientific and “true” knowledge. As to conceptions of History teaching, the author found that older teachers (with ages 54 or higher) were much less concerned than their younger colleagues with linking their teaching to the promotion of citizenship values in the classroom (for example, by stimulating student discussions of History matters and by emphasising the importance of presenting several alternative points of view about the topics that were approached in the program). Significantly, teachers who had been trained before 1974 (the year of the democratic revolution in Portugal) were also the ones who rejected the most the
presentation of contradictory or conflicting versions of history events to the students. Globally, the author’s data suggest that while teachers adhered to the discourse of student-centred teaching and of the choice of multiple strategies and resources in the History classroom, their actual practices pointed to a low use of divergent documents and few attempts to link students’ tacit knowledge and life experiences to their learning of historical knowledge.

**The construction and/or reconstruction of professional identity**

A recent review of dissertations produced in Portugal between 1990 and 2000 on the topic of initial teacher training (Esteves & Rodrigues, 2003) shows that the construction of professional identity has been rarely chosen as a main object of study in research on teaching. A literature search on teachers’ professional leads to the same conclusion. There are, however, some exceptions.

Benavente (1990) researched how primary school teachers, a mostly female and politically powerless social group, experienced the changes that occurred in Portuguese schools after April 25, 1974. The author emphasises that these changes demanded a restructuring of teachers’ social, political, cultural and pedagogical frames of reference. She also stresses that the relation between these teachers’ previous cultural and pedagogical experiences and the new context that was created by the revolution is key to understanding the tensions in the reconstruction of their professional identities and the non-commitment of many of them to educational change.

Sanches’ (1987, 1990) studies of teachers’ experience of school leadership roles offer a different perspective on the issue of professional identity, by showing how the exercise of leadership roles in schools may contribute to its reconstruction. The author’s data show that most teachers don’t regard the exercise of leadership responsibilities in their school as a gain of power over their colleagues, but rather as an opportunity “to practice and to understand the profession from a different angle”. The few teachers who were motivated to participate in the governance of their schools presented “a wider conception of what it means to be a teacher” (p. 27): for some of them, to be a professional implied “transcending the more familiar territory of the classroom, which ceased, therefore, to be the only ‘niche’ of autonomy and intervention”. In particular, respondents who had been involved in school governance thought that every teacher should have the opportunity to go through the experience of leading a school and shared the idea that teacher professionalism was enhanced by “discovering the whole institution”.

Fontoura (1992) approached teacher identity from a different point of view. In a life history study of what it meant to be a History teacher in Portugal, she interviewed six teachers who had at least five years of teaching experience. The author was particularly interested in the relation that teachers maintained with the knowledge that they were expected to teach and in the type of problems that they encountered in trying the teach it. Fontoura found two main types of difficulties in teachers’ experience in this respect: epistemological, and methodological ones. With respect to the former, she identified teacher anxiety about the gap between the History that they had learned and the History that they were asked to teach: what they had been taught to take as objective, certain and true knowledge in the past, was now presented as subjective, relative, a mere possibility. The enlargement of History’s epistemological
field, with the introduction of new objects and the change of emphasis from the “great figures” of the past to the anonymous people and collective movements of the present, challenged everything that these teachers had learned when they studied and were trained to become educators, and made them feel divided between the old systems of historical explanation and the need to find a new system and a new balance in their identity.

Over time, in the career evolution of these six teachers, Fontoura (1992:191) found four common “major trends”: 1) a “change of target”, which moved progressively from the program of studies to the students; 2) a change in the object of study, which ceased to be History as a science (as had been usual in the first years of practice) and became preferably History as a subject matter; 3) growing concerns with students’ conditions of learning, which led to the experimentation of several teaching methods and to the observation of their learning contexts, and 4) a growing tendency to systematically question not only the teaching career itself, in-service training, professional roles and teacher pay, but also working conditions and, especially, the programs of studies. With respect to this latter transformation, the teachers became gradually aware that the historical knowledge that was institutionalised in the secondary school curriculum still privileged the mandatory transmission of the culture of the social elites of the XIX century, while students lived in a totally distinct social context in which that curriculum was meaningless. In this sense, among other things, the crisis of History teachers’ professional identity was rooted on deep debates about the controversial nature of historical knowledge itself and its meaningfulness for the education of students in the end of the XX century.

Almiro (1999) describes a study that focused on a specific training device (the “circle of studies”, a group of teachers who reflect jointly on their practice) that aimed at promoting the professional development of mathematics teachers, particularly, in the improvement of a specific teacher skill: their communication with students in the classroom. The article presents a training program that was based on this “circle” philosophy. The program’s goals were to promote teacher discussion of official curriculum guidelines in the teaching of mathematics (in particular, with respect to teacher-student communication in the classroom), and to stimulate and develop their reflection capacities in a collaborative work environment, by observing and analysing each other’s classes, and reflecting together on ways to improve their professional practice. The circle involved three teachers and a trainer (the researcher).

Almiro’s (1999) results show that by participating in the circle of studies, teachers realised that they were too dominating in the discourse that was produced in the classroom and relegated their students to very secondary roles: they realised that they were always talking, giving orders and pushing their students into a passive, mostly hearing mode. The study confirmed the predominance of a strong asymmetry in classroom discourse that had already been highlighted in studies conducted by Pedro (1982) and Castro (1991). Almiro’s data show that participation in the circle of studies provoked changes in teachers’ perspectives about the nature of their role in the classroom but that, except for one of them, these changes didn’t have significant immediate repercussions in their teaching practice.

Lopes and Ribeiro (2000) present the results of an action-research study that involved “project groups” (comprising 5 to 6 teachers and a supervisor each) who met weekly
to reflect on written registers of their work activities. The project went on from 1993-1994 to 1995-1996. The authors’ research sought to understand the construction of the professional identities of the teachers who were involved in the study throughout this period. The data show that, in a first stage, the project brought to the surface conflicts that had been latent in the group and it had demoralising effects for its members. Participants felt devalued and threatened by the project’s assumptions, namely, the emphasis on the importance of using multiple teaching strategies, and the primacy given to work processes over final products, which questioned key aspects of their previous identities as professionals. The more the group’s work focused on actual teaching practices (for example, by discussing case studies of actual students who were taught by members of the group, and which often involved negative comparisons among colleagues), the more the level of conflict tended to increase, up until a point where the discussion of the case studies had to be dropped in order for the group to remain intact and to continue participating in the project. This had profound implications for participants’ professional identity, which began to be constructed more around the issue of professional relations among school colleagues and less exclusively around subject matter knowledge and didactics issues.

Lopes (2001) also reports on the relational process of teacher involvement in small groups whose aim was to stimulate the reconstruction of their individual identities as professionals. The author studied the effect of interaction processes in these groups on teachers’ perception of themselves, of their school and its actors, and on the structure of their personal identity. In terms of teachers’ perceptions of their school, the data showed that there was a change in the communicational component of their professional life, which gradually integrated a higher number of daily exchanges with colleagues and the progressive valuing of these exchanges of experiences. There was also a development of the organisational component of their identities, with a greater awareness of the school as a place whose quality of education was a product of teachers’ collective action. Finally, there occurred important changes in the pedagogical component of teachers’ identity, because their work with their students came to be viewed in terms of the whole school and not only as a function of what each teacher did in his or her own classroom. All these changes were linked to transformations in the structure of teachers’ personal identity: they started to present less “perfect” evaluations of themselves and to produce less negative evaluations of their colleagues.

In a later study, Lopes (2002) mapped the kinds of psychological changes that underlay primary teachers’ personal change, as they participated in an action-research project that aimed at making teachers’ work more creative. The author shows how participation in this project entailed changes not in the curriculum of the school, but also in teachers’ cognitions, affects and ways of relating to each other. An interesting aspect of the study is that before participating in it, teachers had extremely idealised images of themselves, which were expressed in a rigid coincidence between what they thought they were and what they stated they would like to be. At the end of the project, these images had vanished: participation in it had brought about teacher dissatisfaction with their work and more “humble” professional attitudes. The author attributes this development to teachers’ lowering of their personal defences and to their subjecting themselves to new challenges that brought about intrapersonal conflicts that are a crucial pre-condition for real professional change.
RESEARCH APPROACHES

The overwhelming majority of the studies that have approached Portuguese teachers’ work experiences in the period under analysis (1960-2004) have used a qualitative design. Most of them are case studies of small groups of teachers or of one or two schools. Generally, the case studies include semi-structured interviews, some of which use a life history approach. Much less frequently, these studies also include non-participant observation and document analysis. Very few studies have used national representative random samples. Virtually all of the quantitative studies are survey studies of an exploratory nature that make no claims for the generalisation of their results. Only a very small group of studies have opted for a mixed-methods approach.

CONCLUSION

Most of the research studies that have been published in Portugal on teachers’ professional lives are the result of theses and dissertations that their authors have presented in response to career progression requirements. Moreover, there are no clearly constituted lines or schools of research in the country which continuously or systematically endeavour to clarify specific areas of teachers’ lives over time. For these reasons, the overall picture of the field is sparse, with huge gaps in many areas which deserve further research, or which haven’t even been researched at all (e.g., politics in the profession, racial issues).

Furthermore, in the works that have been published on teachers’ work, there is a severe imbalance between abundant theoretical analyses and conceptual essays, on the one hand, and infrequent and unsystematic empirical studies, on the other (the ones that have been reviewed in this paper). This is particularly visible, for example, in the two areas where there have been more changes in public policy in Portugal that affected teachers’ professional lives in recent years: school management and curriculum policies. Many papers and books discuss the new models of school management and the new approaches to curriculum flexibilisation that have been introduced by the state, their characteristics, potential and limitations, but few have attempted to empirically understand how these changes have been actually experienced by teachers and even less how they have been integrated into their sense of professionalism, or impacted on their identity.

On the other hand, the studies that have been conducted on relevant aspects of teachers’ lives have not usually integrated their findings into a more general discussion of their meaning and implications in the context of welfare state restructuring and its consequences for teachers’ work, professional cultures, identities and their careers.

Of course, this global characterisation of Portuguese research on teachers’ work as rare and unsystematic must be understood in the context of the political and social evolution of the country and of its consequences both upon the educational system and the academic profession itself. Educational research in Portugal is only three decades old; it’s still a young field of inquiry. There is much work to do, in order to achieve a more comprehensive and in-depth view of teachers’ work and lives and they relate to official educational policy-making.
(Re)Constructing the Profile of Nurses in Portugal: A Review of Some Research Results

Helder Rocha Pereira

Introduction

Professional knowledge, conceived not only as theoretical knowledge but also as knowing in action, is directly related to the contexts where practice occurs. Actually that knowledge form is deeply connected to various factors: the potentialities and constraints emerging from the policies which shape it; the way professionals conceive their role; the relationship they establish with those who may benefit from their performance and the adjustments they introduce in their practice in order to fulfill what they consider to be their professional aim in a specific socio-historical context.

It seems therefore appropriate to attend to professional knowledge from the contexts of practice, instead of conceptualizing it merely as unchanging propositional knowledge. Thus, it is necessary to set these issues taking into account Nursing history and the different views of nurses’ work along times.

In Portugal, in the nursing profession, the path traveled from the mid-twentieth century up to the present reveals some crucial steps and some breaks which took place inside the profession, in the admission to it and nursing professionals’ empowerment.

There has been some discussion of these matters, particularly in what as concerns the changes in the nursing profession and its place in Health Care provision. Rather than focusing on these issues, this report centers on the effects of various restructuring policies undertaken in Health Care on the professional knowledge, the careers, the professional identity and the experiences of nurses as seen through the lenses of research results in the area.

In the course of this study, several obstacles were met, which we now list: in the first place, there was some difficulty in having access to research studies on the nursing profession as most of these are undertaken for academic purposes and as such many lay unpublished in the libraries of the institutes where the degree was taken. Secondly, the topic of this study has not been a priority in research undertaken by Portuguese nurses. Their research agenda is focused on topics such as professional development or nursing professionals’ practices. Thirdly, most research is the outcome of personal or small group research interests and there’s a lack of formal, ongoing research agendas. An emerging growing movement towards the establishment of new research units and teams express some current efforts to overcome this problem.
In this context, the studies undertaken are spread over multiple themes and research approaches and at the outset of each new study there’s a feeling of continuous by starting over.

In order to overcome the lack of research on the topic of our study and the difficulty in accessing the existent studies, we developed some strategies: firstly, we reviewed nursing, health and social sciences journals; secondly, in order to overcome the lack of research literature on the topic, we chose to collect data in the libraries of institutions where we knew that some nursing professionals had developed research to obtain academic degrees. Lastly, due to the small number of studies on the theme, we resorted to updated collections of nursing research abstracts and to interviews with some privileged informants.

Having presented some of the shortcomings of this review, we will know proceed along three main guidelines: firstly, a short summary of the development of the nursing profession and nursing education in Portugal, namely in what refers to some landmarks of the development of a professional identity; then, a presentation of research results (or the lack of these) in the themes of this study; lastly, a description of the state of the art in nursing research in Portugal, particularly with regard to the most common interest areas and to methodological approaches.

Time – The history of nursing in Portugal

The history of nursing in Portugal has been researched especially by Nunes (2003) and Rebelo (2002). This section draws mainly on their work.

In Portugal, it was only after the beginning of the twentieth century that the first schools of nursing were systematically established in the dependence of the central hospitals of the major cities. These schools were directed and promoted by doctors and the training provided was limited to some basic medical knowledge considered necessary for the performance of auxiliaries’ roles.

In general, nursing courses lasted two years and could be attended by both men and women over 18, provided they possessed the required qualifications: grade 4 of primary schooling.

By the end of the twenties, as a consequence of the restructuring of the Health Care system, public hospital regulations were introduced and nursing professionals fell into different categories: head nurse, deputy head nurse, first and second class nurse. With slight adjustments, this would be the matrix of the career organisation for the 60 years that would follow.

Until the end of the late thirties, schools used to admit both male and female nurses, but from then on, influenced by American models, they started to give preference to female students and some admitted only female students for their training programs.

From this starting point, the foundations were set for the social-professional organisation and development of the nursing career in Portugal. For a deeper understanding of the path traveled, it is important to locate some issues in the
nursing profession (over the last 60 years) such as the main political decisions taken in the Health Care area, progress in gender issues and changes in nursing education.

1945 – 1975

It was during this period, in the forties, that most of the major contemporary Portuguese schools of nursing were established. However, it was only after 1944 that the practice of nursing was forbidden to anyone who did not have the qualifications for the job. Despite this, a law passed in 1942 had ruled that anyone who possessed two years practice as a nurse certified by a doctor could be admitted into the nursing profession. This gave birth to the expression “nurses of 42”.

The year of 1947 was an important landmark as far as the history of the organisation of the nursing career in Portugal is concerned. A reform introduced some crucial changes. Firstly, two levels of nursing professionals were created with different qualification requirements: nursing auxiliaries, who had to possess basic schooling plus a single year course, and nurses, who had to qualify from high school. Initially, only the first level was required, but shortly afterwards the second level became a basic requirement. Secondly, the number of women who entered the profession increased as regulations explicitly favored female applicants (except for psychiatry and urology).

Despite these improvements, there was a dramatic shortage of nurses. Bad working conditions, low social prestige, low wages (particularly when taking into account the qualifications required) and hard restrictions on matters of the professionals’ personal life, such as the prohibition to marry applied to female nurses, were some of the factors that contributed to this problem. All these drawbacks made it difficult to recruit new professionals and caused many to leave the profession prematurely. This shortage was particularly observable when compared with other countries (one nursing professional for 3.275 inhabitants in Portugal versus the international recommendations – one professional for 500 inhabitants). In the late fifties, the census indicated a total number of 7000 professionals, including qualified nurses, auxiliaries and certified nurses.

As for professional education, in 1964 the area of nursing teaching was established under the responsibility of nurses from the General Board of Hospital (Direcção Geral dos Hospitais). In keeping with the changes in the Portuguese society during that period, the teaching of nurses came under the responsibility of these professionals. By the beginning of the seventies, this had become common practice.

In Portugal, the revolution of April 1974, put an end to the totalitarian regime that had been ruling the country since the twenties, isolating it from Europe and even from the rest of the world, so the year of 1974 cannot be avoided by any type of analysis. Under a democratic political situation, a new age emerged in all domains of Portuguese life.

1975 – 1995
At the beginning of 1975, in Portugal, there were 3000 nursing professionals versus 15,000 auxiliaries. These professionals had been claiming general access to the level of nurses, which occurred by then. From then on, the nursing career demanded a single training level aiming at providing general Health Care.

This was a crucial period for the organisation and understanding of the nursing profession as it presents itself nowadays in Portugal. Nunes characterises briefly four main landmarks in this process:

During this period several changes take place: the establishment of a single basic training level aiming at providing general Health Care (1974); the whole process leading to the autonomy of the schools previously under the dependence of hospitals, that now come under the control of qualified male and female nurses; the single career of nursing professionals where all know their job and to which all have access (1981), as well as the integration of nursing education in the national university education system (1988). Nunes (2003:320-321)

This context promoted the empowerment of nursing professionals, most of which became civil servants, thus profiting from higher wages and lower working hours – 36 hours per week.

During this period, the nursing profession gained a new reputation and became an option for many young students, even before nursing education was integrated into the National Educational System. To enter nursing courses, applicants needed a high school degree (11th grade). This high requirement level was set due to a high number of applicants.

This process led to the full integration of nursing education in technical college education in 1988. The nursing course (three school years) conferred a bachelor’s degree, making it possible to get any other degree. It was in this context that the first master courses in nursing education took place.

In turn, the issuing of the nursing career regulation (DL 305/81) made other steps possible: a new career progression based on grades (grade 1 nurse, grade 2 nurse, specialist nurse, head nurse, supervisor and nurse technician) no matter the place or area of work (Basic Health Care or Secondary Health Care); peer evaluation at professional performance; and definition of roles and tasks within each grade. There was an increase in regulation in all areas of nursing.

Despite the huge shortage of nursing professionals, during this period, by 1995, the figures rose to 30,000 professionals (Rodrigues, 2002).

1995 – 2005

The latest period was characterised by a growth in regulation, by the consolidation of nursing education at the higher education level and by the introduction of new management models in hospitals and primary Health Care centers.

As for regulations, the issuing of REPE (regulations for nursing as a professional activity, DL 161/96) in 1996, which had long been a cherished aspiration, is considered a crucial step. His regulation clarified concepts and practices and
characterised nursing care and practice as autonomous and interdependent; it also functioned as a national regulation tool for the profession in a context of multi-professional Health Care.

Still with regard to regulations, in 1998 the Nursing Professionals’ Association (Ordem dos Enfermeiros) was established. This way, the government recognised nurses’ aptitude for defining practice regulation and control devices as well as for adopting an ethical and a disciplinary code that would run their practice and assure the quality of nursing care (arguments for the establishment of the Nursing Association, DL 104/98).

In the domain of Health Care policy, from 2002 onwards, as a result of studies which indicated the need for more flexible management to increase effectiveness and also of some previous successful experiences, new hospitals were organised as limited companies of public funding or as private-public companies adopting management principles closer to private enterprise companies. That is, in this context, the state has the concession of the hospitals and primary Health Care centers, it acquires previously agreed services and supervises the system (these hospitals remain within the National Health Service and its performance inspection system). The recent establishment of the Health Care Regulation Entity (Entidade Reguladora da Saúde) illustrates the state’s growing role as a regulator in the field.

During this period, Carapinheiro and Lopes (1997) conducted a nationwide socio-graphic study on resources and work conditions of Portuguese nurses. This study aimed at collecting global institutional data on the nurses’ working circumstances and data on specific working conditions and resources in particular contexts, such as different types of hospital departments. The Population included all the hospitals and primary Health Care centers and the data collection method was a self-administered questionnaire distributed to director and head nurses from different hospitals and primary care centers. There was a high response rate (77,2% of the hospitals and 80,6 % of the primary Health Care centers) and these figures indicate a representative sample of the Health Care units.

This study revealed that in primary Health Care centers there was a middle-aged professional population (57% of the nursing professionals were over 41 years old and 30% over 51), mostly constituted by female nurses (87% female and 13% male nurses), whereas in hospitals there was a lower predominance of women (81%) and there was an opposite situation as far as age is concerned, since 66% of the professionals were under 41.

A brief review of the figures displayed by the Nursing Professionals’ Association gives a picture of the quick evolution of the Portuguese nursing profession. By the end of the year 2000 the figures identified 36.198 professionals (82% female nurses) with an average of 38,7 years of age (60% under 41), whereas by the end of 2003 there were 43.874 professionals - 81% women - enrolled in the association, with a lower average age - 36,8.
The number of foreign professionals working in the National Health System was very low. Nevertheless, with respect to nurses and doctors, the figures were rising more and more. On the whole, these foreign professionals concentrated mostly in the Portuguese capital city and as to nursing professionals, in 2000 there were already 1,376 of them, 81% from the EU, almost all of them of Spanish origin (Rodrigues, 2002).

In the area of nurses’ education, only 10 years after its integration in college education, a new reality emerged. In fact, after 1998, schools of nursing started to provide higher education degrees in nursing after a four-year course. Consequently, from then on, admittance into the profession requires a degree in nursing.

After 2003, the first PhD degrees in nursing were granted in Portuguese universities, thus enlarging the possibilities of development for the knowledge area of nursing both as a discipline and a profession.

**A view of nurses’ profiles**

As mentioned previously, it was not possible to identify clear research lines on the impact of the implementation of new Health Care organisation policies on the profession.

In addition, the new management models of Health Care units characterised by less control from the state and more proximity to private enterprise (as these have been given much more financial and operational freedom) have not yet developed a steady path, which might have caused interest in nursing research.

This situation is mentioned by Simões (2004) who proposes to study, amongst other aspects, the evolution of state-run hospitals in Portugal, as well as the development of public administration and its influence on state-run hospital models, by comparing different management models which emerge in this context. In a study titled *Political Portrait of Health*, Simões (2004) concludes that “from 2001 on, signs indicate a growing influence of market forces, to the detriment of social partners, and a tendency for the state to reduce its responsibilities to a progressively regulating role” (Simões, 2004:323).

However, this process is right at the beginning and only future research may evaluate if it will, in fact, constitute a clear break with the past.

Research interests in nursing seem to be focused on other domains. Indeed, research questions seem mostly concentrated on the changes observed in the roles of Health Care professionals in the context of Health Care provision, as well as in the definition of nursing care and how these changes interrelate with the contexts of practice and interfere with the clients and with other professionals in Health Care. These changes are not independent from the questions previously mentioned in the domain of career restructuring and particularly in the area of education changes previously highlighted in this text.

Portuguese research on changes in nursing and in nursing professionals is grounded on some assumptions that Lopes (2001) lists briefly as follows: (1) the...
integration of new technologies; (2) the complexity and multidimensionality of the health-disease paradigm (which broke with the prevailing bio-medical paradigm); and (3) the path of nurses’ professional development (exemplified in the growing demands as regards to qualifications to access nursing education, in the introduction of themes from the social sciences into the curricula and in the emphasis placed on the promotion of health). Below, I review the results of some studies on these topics.

Questioning the present state-dependent financing model and taking into account the urgent need for alternative models of hospital management, Monteiro (1999) analysed the structure of hospitals according to the Mintzberg Model (1982). Thus, taking into account that the hospital organisation is complex, she analysed the interests of the different professionals, so as to understand, from the different actors’ point of view, common grounds for the prosecution of shared aims. The data were collected through semi-directive interviews (N=18) with the strategic leaders, the administrative board and the operational leaders (department directors and head nurses) of a small hospital. The aim of the interviews was to collect the opinion of the interviewees on the following categories described by Mintzberg (1982): (1) professional identity, (2) centralisation or decentralisation, (3) structure differentiation, (4) different types of activity articulation, (5) emerging conflicts, and (6) relationship with clients.

Regarding the structure, the author found that there was much decentralisation of the various departments, which might cause difficulties to clients in need of different kinds of care involving various departments. Due to this balkanisation, there was often a lack of knowledge on what was going on beyond each one’s department. There was also an obvious double hierarchy in each department, the medical and the nursing, independent from each other even at the strategic level. According to the author, this situation can work as an obstacle to the functioning and the articulation of the departments.

As to personal identity, professionals mentioned that they identified themselves with the profession, that is, they favored their career to the detriment of the organisation. The interview data revealed some differences between doctors and nursing professionals. Doctors looked upon themselves as individualists and referred to nursing professionals as a whole group, whereas these looked upon themselves as a homogenous differentiated group. Some differentiation between groups seemed to be evident.

With respect to the perceptions of the different professional groups, top leaders were more concerned with quantitative objectives, whereas operational leaders turned to more qualitative aspects. While doctors worried mainly about technical-scientific issues (to improve equipment, to open new specialty areas), nursing professionals cared both about technical matters and about humanistic issues having to do with the quality stay and accommodation.

There was also a noticeable absence of a culture of taking into account clients’ opinions, so professionals were not pressed by it.

Once more, the results of Monteiro’s (1999) study, even though limited and restricted in scope to the study itself, call attention to issues such as professional
identity and strategies used by professionals in the domain of professional development.

Researchers have recognised the need to take into consideration the framework with which nurses identify, that is to say, the paradigm that guides their practice or that orient their professional model. In this respect, Serra (2000) developed a study to answer the following research questions: “What paradigms – biomedical and bio-psycho-social - underlie the professional identity of nursing professionals and how far is this identity in accordance with the existence of an organisational identity?” This study aimed at, on one hand, identifying the paradigms underlying the practice/professional identity of nursing professionals and, on the other hand, assessing if the professional identity of the group enforced the organisational identity or if it worked as an obstacle against it.

The study, involving nurses of a local hospital (N=123), revealed an interesting set of conclusions. Firstly, the author showed that there were two underlying paradigms: one could be theoretically identified as the bio-psycho-social paradigm, but in practice it revealed itself as a bio-medical paradigm.

When analysed according to age, Serra’s (2000) results indicated that nursing professionals who had graduated over 20 years before expressed theoretical constructs closer to the bio-medical paradigm. However, results also suggested that in practical terms there were no differences between this and the other group and that in general the orientation was in accordance with a bio-medical model.

Conclusions also indicated that in the group studied there was a strong identification (90.7%) and a sense of belonging to the profession (97.7%), which illustrates the awareness of differences in the way nursing professionals defined themselves versus other professionals.

Unlike the study of Monteiro, Serra’s (2000) revealed a strong feeling of professional identity among nursing professionals, no matter the underlying theoretical paradigm, and also suggested that this paradigm did not impede a strong sense of affective relationship with the institution.

In another study, Rosa et al. (2004) sought to establish a typology that reveals the positioning of nurses towards the profession. In order to do so, a model was drawn which identified the following types of frameworks: (1) technical-scientific, (2) relational, (3) pragmatic, (4) technical-relational, (5) technical-pragmatic, and (6) relational-pragmatic. In order to identify their relationship with each of these frameworks, nursing professionals were questioned about a number of factors considered important for a good result of their work, which were associated to each of these frameworks.

In the evaluation of the various frameworks, the aspects that were more valued by the professionals were “possessing technical-scientific knowledge (85.3%)” and “being sensitive to the needs of the clients (76.2%).”

The authors mention that “reality reveals itself more complex than expected making obvious the power of mixed models and connecting, for example, factors from the scientific model with factors from the relational or the pragmatic
models, in a study where the technical-relational aspects predominate, followed by the technical-pragmatic ones” (Rosa et al., 2004:85).

The results of this study become more meaningful if we view them from the standpoint of the previously mentioned gap between theoretical values and practices. In fact, the researchers identified a meaningful negative correlation (although weak -0.171; p< 0.01) between the prevailing tasks and motivation.

A regularity already identified by Serra (2000) is also to be found in these results. Indeed, 46% of the tasks performed by nursing professionals belong to frameworks that are poorly valued by them. Consequently, for the majority of the inquired professionals, and keeping in mind that 94,4% of them stated that they enjoyed what they did, it seems reasonable to infer that the motivation emerges not from the major tasks they perform, but from other tasks which are individually more meaningful. In our opinion, these issues are not unrelated to the emerging frameworks of the nursing profession and to their intersection with the different levels of organisational culture. What do nursing professionals think about themselves and about their role? In what way do they perform their role? How do they restructure their performance in organisational contexts? How do they manage the change of focus inside the profession? In this respect, Rosa et al. (2004:192) suggest: “hence, from the practical standpoint, it is desirable to approximate the contents of work to the prevailing frameworks: technical-pragmatic and technical-relational”.

In turn, while studying the duality of space and time in the daily life of a nurse and reflecting about the way these factors affected professional practices and about the resulting informal education processes, Guimarães (2002) confirms this change of focus in the orientation of the work of nurses. In her ethnographic study, which was implemented with nurses in a hospital department, the author identified new forms of conceiving and organizing the work of nursing professionals in Health Care, which were observable in the mediating actions taken by nurses. The author stated:

*While the taylorist orientation that prevailed in the organisation of space suggested the reproduction of social practices, the centrality of clients in nursing tasks suggested the development of more reflective informal education processes. Mediation allowed a stronger social acknowledgement of the profession and also favored the reconstruction of personal identities grounded on a larger autonomy.*” (Guimarães, 2002: 90)

Yet, the author also concluded that secondary socialisation did not always allow for “changes in identity based on autonomy and responsibility of the social actors” (Guimarães, 2002: 140). Once again, the issue is the major contradiction between the valued psycho-social role of nursing – as a dominant aspect of the profession - and its social status determined by the actual placement in Health Care and nurses’ proximity to their clients, which determined the professional’s place in the social division of work.

Within the same line of research, in 2001, Lopes published a text titled *Professional Rearrangement of Nursing – sociological study in hospital context.*
The text was based on a study developed in the 1990’s, which aimed at understanding the dynamics of professional rearrangement that are noticeable among nurses. In other words, it intended to understand in which social processes the strategies of professional empowerment were inscribed and what their impact in the reshaping of the sociological reality of the group was.

In this study, which took place in various departments of two hospitals of the Portuguese capital city, data was collected mainly through direct observation and complemented by questionnaires, semi-structured interviews and documental analysis. As to gender, participants (N=99) were mostly female nursing professionals (87.9%).

The study aimed at analysing (1) knowledge, (2) ideologies and (3) nursing identities from the standpoint of the contexts of practice. Briefly, it concluded that:

i. Nursing knowledge:
   The types of work organisation constituted an obstacle to the visibility and consolidation of knowledge re-construction. In fact, the author concluded that:
   
   “The prevalence of the daily routines of their practice, the balkanisation of their work acts and the reduced freedom of decision that characterise that job, reveal daily situations which require a reduced access to uncertain or analytical forms of knowledge and in which practical knowledge becomes central; this limits the competences that are formally recognised as essential to the fulfillment of those acts to what Dubar (1991) calls operative gestures.” (Lopes, 2001:139)

   Despite this, the study also demonstrated that in the performance of the tasks organised around the so called “routines” (evaluation of vital signs and medication administration, to name just a few), the areas of cognitive mediation, which are inscribed between formally acquired forms of knowledge and forms effectively activated for the fulfillment of those tasks, acquire special relevance. Thus, it may be inferred that nursing knowledge cannot be reduced to the above mentioned “operative gestures”
   
   A recurring theme is the evidence that:
   
   “despite the growing conceptual reconstruction and acknowledgement of nursing care acts, their transposition into professional practice does not acquire in these departments the social visibility that is verbalised in the professionals’ discourse.” (Lopes, 2001: 141)

ii. The ideological configurations of nursing
   Among the nurses, the emergence of a valorisation of nursing as a science expressed by competence in the area of formal knowledge became obvious. In accordance with the results of other studies already mentioned in this report, this one revealed differences in ideological frameworks according to the age of professionals, that is, the older ones valued technical practice, whereas the younger sub-groups emphasised technical-scientific education (Lopes, 2001).
The direction of the ideological rearrangement of nursing seemed to be centered around the orientations that sociology describes as the ideology of professionalisation (through the movement from the relational domain to that of instrumental proceedings) and the ideology of professionalism (through an emphasis on a distancing from the medical domain and the technical profile, in association with the valuing of rehabilitation and of relationship’ with clients) to the detriment of the traditional ideologies of the nursing profession that focus on vocation (Lopes, 2001).

The orientation towards one of these ideologies was evaluated through a five-point Lickert scale. The data collected revealed that there were no extreme positions between the different orientations. Yet, it was obviously evident that the ideology of vocation presented the lower rate (3.054), which excluded it from the rates which represented approbation. Also, the ideology of professionalism presented a medium rate close to the edge of approbation (3.388) and the ideology of professionalisation registered the highest approbation rate (3.825) (Lopes, 2001).

Quoting the author: “the uneven expression of each of these ideological frameworks among nurses, and particularly the fading of the vocation framework, suggests, in the first place, the professional rearrangement of the profession” (Lopes, 2001:168). We would add that these results do not seem to be unrelated to the processes of professional revaluation of the nurses’ education, made tangible through higher level education, in schools run by nursing professionals where content is directly related to nursing care and takes a leading organising role in the curricula.

In the analysis just mentioned, age was also taken into account. Even though figures were not statistically significant, they indicated that it was in the vocation framework that there were higher rejection rates as one moved from the category of older nursing professionals to the category representing younger professionals. As a result, it can be concluded that the ideologies of professionalism and professionalisation are the ones that presently show a greater ideological gap.

“These (ideologies) are also the ones that have been introducing a gap between medical and nursing conceptions as to the most suitable forms of promoting clients’ well being in each concrete situation, at the same time that they move the traditional ideological loyalty from nursing to medicine into the loyalty to the client, which constitutes the major argument of the recognition in speech of their professional practices.” (Lopes, 2001:170)

iii. Nursing professional identities

Lopes (2001) considers that identities constitute the area where ideologies and knowledge embodied by nurses cross and converge. In this sense, she states that:

“Therefore, in the uneven social acknowledgement that nurses attribute to the various work categories that constitute their area of activity, we find inscribed not only the resources that each professional generation
One concludes that it is in the articulation of these obstacles and opportunities that different identity profiles emerge, which in turn suggest what the emerging revaluation strategies of the profession are. The research applied a questionnaire conceived on the basis of a set of working habits performed by nurses. The professionals were required to choose from a 1 to 5 Likert scale between lack of satisfaction and different levels of satisfaction. Through factor analysis, a structure of five factors was obtained, which explained 62.1% of the total variance. Different activities considered as work categories were aggregated in each sector: (1) technical-instrumental activities (M=3,646), (2) execution activities (M=3,348); (3) autonomous activities (M=3,946); (4) basic activities (M=2,942) and (5) specialised activities (M=4,113). The analysis of the results highlighted that the predominant identity profiles could be designated as professionalist (characterised by appreciation of technical issues and of tasks interdependent with medical work) and also as a profile corresponding to neo-professionals (characterised by an appreciation of autonomous action in association with the formalization of professional knowledge) (Lopes, 2001).

In sum, in the rearrangement of nursing knowledge, it was the dislocation from the practical knowledge category to the analytical forms of knowledge that was highlighted. As to the professional ideologies and the identity profiles, there was a clear rejection of traditional models and the emergence of a gap between those professionals who value primarily the areas of functional action and those who cherish recovery and the development of an autonomous work environment.

Still regarding the domain of professional identity, Abreu (2001) formulated the following questions: What does it mean being to be a nurse? How does one learn to become a nurse? At the first stage, the aim of this multiple-case ethnographic study was to question and reflect on the way students had built their identity in a school environment. Afterwards, in a subsequent study involving a group of nurses (in the field of primary Health Care), the research aimed at understanding how this identity changed through contacts and experiences in the work environment. The first thing the author noticed, through a review of some studies, was that nursing was going through a process of change to which the studies previously mentioned in this text also alluded. As in Lopes’ (2001) study, this author also concluded that

“in the different contexts that were studied, the less valued group of skills is the one that refers to conceptualisation competencies; this is a reality recognised by most of the actors.” (Abreu, 2001:296)

It was visible that work contexts did not favor the development of conceptualisation competencies. This was partly due to the strong influence of the medical model of work division, as well as to the instrumental nature of Health Care provision (particularly in hospital contexts).
This result, which is extremely useful for the organisation of work and Health Care provision, constitutes an important contribution for the restructuring of the education of nursing students and professionals and is in agreement with the conclusions of the study by Rosa et al. (2004), according to which it is advisable to match work contents with nurses frameworks.

In Abreu’s (2001) study, both in the group of students and in that of the hospital nurses, a new identity framework seemed to emerge:

“The emergence of an alternative form of viewing and conceiving the profession and professional practices which do not fit in the traditional dichotomy (bio-medical vs. psycho-social) (...) confirms the importance of training in the area of medical sciences, not reducing it however to the technical dimension, but spreading it to the relational area.” (Abreu, 2001:300)

This new identity type emerges as a compromise between the technical and the psycho-social dimensions and seems, once again, to be in accordance with the results of Rosa et al’s. (2004) study, which revealed that the technical-relational framework (characterised not only by scientific skills knowledge but also by sensitivity to the clients’ needs) is the one nurses identify with the most.

Results also indicated that the occurrence of some conflicts and tensions with administrators created specific dynamics in doctors and nurses’ relationships that resulted sometimes in moments of proximity, other times in moments of separation or in alliances which played important roles in the development of professional identities. Presently, as a result of the changes being introduced, this is one of the research lines that should be secured and monitored.

Finally, the research results indicate the central role of schools in the socialisation of nurses: “the main intelligibility frameworks that support the process of the social construction of the profession are drawn in the heart of schools” (Abreu, 2001:300).

In this way, schools seem to play an important role in the course of nurses’ professional empowerment, both through the rise in the qualifications required to accede the career and through the introduction and dissemination of concepts, models and theories with their manifold manifestations in the frameworks (including conceptions, paradigms, etc.) nursing professionals recur to. It should also be noted that these schools are going through ongoing change processes themselves.

Taking into consideration the outcomes of the legislation changes which allowed schools of nursing to turn into colleges of nursing after 1990, Sousa (1996) studied the way teachers of nursing experienced their double role as teachers and nurses. Among other objectives, the study aimed at characterising the professional identity of nursing teachers. The study, implemented in a Lisbon college of nursing, revealed that the teaching staff considered that teachers of nursing enjoyed a low social profile and also that they looked upon themselves mainly as nurses.
In a study with a similar focus but a different methodology, Fernandes (1998) reached different conclusions. The author also aimed at identifying the professional identities of teachers of nursing during the transition stage. One of the purposes of this research was to analyse the professional identity of nursing teachers from the standpoint of social identity theory. The study was based on the assumption that, given the new status, “as a teacher and as a nurse, this professional seeks a revaluation of his/her role, aspires to a new identity, a new way of being and experiencing the profession, as a result of the recently acquired status” (Fernandes, 1998:48).

In the study implemented with teachers from Lisbon colleges of nursing (N=199), a questionnaire was used with a professional identity scale and open-ended questions for free association of words. Results confirmed a stage of change, but the teachers, although possessing a mixed identity (teachers and nurses) categorised themselves predominantly as teachers (47.5%), as teachers and nurses (38.1%) and as nurses (14.4%).

In short, the issues that guide research on nursing in Portugal are not yet centered on the way work and personal life are organised as a result of the political changes that were introduced. Instead, they are focused on themes to be clarified and discussed around the profession: what performance is more qualifying and more valued; how it articulates with the contexts of practice and how to give it visibility at different levels (intra-professional; with the clients; in multi-professional Health Care and in the context of the objectives and aims of Health Care provision institutions). However, in questioning nurses about their perception of the impact of some of the most influent changes of Health Care provision services on aspects such as (1) the development of information and communication technologies, (2) progress in health technologies, (3) development of Health Care technologies, (4) changes in work practices, (5) changes in the management of the institution, and (6) changes in Health Care policies, Rosa et al. (2004) concluded that, as far as negative impact was concerned, the issue of “changes in health politics” prevailed over the others (even tough it did not surpass 12.3% of the answers).

In short, based on the results obtained in their study on the work conditions of Portuguese nurses, Rosa et al. (2004) came to the following conclusions:

- nurses are satisfied with what they do (94% state that they like it, although the rate is lower – 59% – when they refer to colleagues satisfaction) despite being dissatisfied with their work conditions;
- situations of change/lack of professional stability, work schedule (50% of the professionals work more than 50 hours on average per week and 53% declare having difficulty in conciliating personal and professional life – a situation that is more common among those under 45 years of age), management practices and material conditions were identified as having a stronger negative impact.
- management practices score high in the issues that are considered neither negative nor positive (47%), which seems to be related to nurses’ withdrawal from these practices.
The state of research on nursing in Portugal

For a better understanding of the main approaches followed in nursing research in Portugal, it is advisable to briefly contextualise its development. In order to do so, we will resort to the analysis and summary of Basto (1998), which synthesises it clearly.

The beginning of research on nursing in Portugal dates from the 1970’s; With regard to contents, for three decades, studies on “who are nurses”, pedagogical issues and administration prevailed; As to methodology, descriptive studies predominate whereas experimental and phenomenological studies are rare; Research funding is rare (except for some research promoted by the Ministry of Health); Results of research studies are seldom used and there is a lack of knowledge about what has been researched.

As a means of making clear, in a few lines, research interests on nursing in Portugal, we resorted to various reviews of the literature by several authors who aimed at characterising the state of the art or at using this information as a basis for launching new research projects.

Soares and Basto (1999) analysed 541 abstracts of academic research studies developed by nurses between 1987 and 1996. This analytical study aimed at checking if research produced in nursing used to take into account previous similar studies or if studies were being repeated on the same subjects out of lack of information on previous research.

The conclusions of this study highlight: (1) a predominance of studies on nurses and only a few on the results of nursing care; (2) the obvious existence of repeated studies, that could not, however, be considered as replications of previous ones; (3) regarding the methodological approach, a clear preference for quantitative approaches (317 out of 541); only 49 opted for qualitative analysis, whereas the rest of them opted for mixed approaches or else the approach was not evident from the abstract.

Building on the results of the study just mentioned, Basto and Magão (2001) developed a documentary analysis of 315 abstracts of published studies and papers (190 of which are Portuguese), with the purpose of preparing a research project in the domain of practical knowledge in daily nurse-client interaction.

The main results of this study are the following: (1) a trend towards studying nurses prevailed and one can ask if the knowledge produced was useful to the specific conceptual issues on nursing and if, eventually, it reverted to those who benefit from nursing care; (2) emphasis was placed on methodology instead of conceptual issues; (3) there was a need to value cumulative effort, since it is devastating to feel that one is always starting over in research.

It is particularly interesting to take into account the work of Teixeira (2001), Paiva (2001) and Lopes (2001). These authors refer to the analysis model by...
Rebelo (1996), based on the proposals of Le Boterf (1995) on notion of practice – as a way of making literature intelligible:

“(The) model conceives practices as resulting from various contexts – social, marked by history; subject, personal biography; profession, where professional models emerge and are built (knowledge, norms, values that guide the profession); action, which materialises organisational models, places and concrete structures of the work to do.” (Rebelo, 1997:16)

The object of the study conducted by the three above mentioned authors was research by nurses in the 1990’s in Portugal and it aimed at identifying the state of the art of nursing research on practices according to the contexts of profession, action and subject (Teixeira, 2001).

The authors reviewed abstracts and conclusions of studies developed during the nineties and sent by the Colleges of Nursing and by the Local Health Care Administration (N=530). It was immediately apparent that most studies were implemented in order to obtain academic degrees (only 118 were performed on duty). 190 abstracts that fitted into the categories proposed to analyse nurses’ practices (according to the three contexts quoted – subject, profession and action) were selected.

Teixeira (2001) focused the analysis on the studies reporting to the context of the profession (N=36) and reached, among others, the following conclusions: (1) concerning the methodological approach, most studies were designated as exploratory; (2) there were no studies building upon previous ones; (3) interviews (structured or semi-structured) were the most frequent data collection instruments, followed by questionnaires and scales, participant observation, non-participant observation and, lastly, systematic observation.

Paiva (2001) analysed the studies that focused on the context of action of nurses’ practices. He researched 82 abstracts (48 of these implemented in Portugal). From the Portuguese studies, only three resulted from research produced in the contexts of practice, outside the sphere of academic research.

In the studies on the context of action it was possible to verify that: (1) there were only ten cases in which a direct relationship could be established between nursing care and the context of action involving organisational models (the main factors identified as interfering with nursing practice being nurse-client ratio, work organisation methods, leadership style, nurses mobility, structure and models of Health Care decisions); (2) a significant number of studies were quasi-experimental; (3) there was also a meaningful group of descriptive exploratory studies; and (4) very often, the external validity of the studies was impossible to achieve, due either to the size of the sample or to the technique chosen to collect the data.

Lopes (2001) analysed the research whose object of study was the subject-actor. From the Portuguese studies included in the sample, 52 abstracts were analysed, and out of these, only 4 had not been implemented in an academic context. The
studies were organised into six categories according to the content of their abstracts: individual/professional abilities; beliefs, representations, perceptions, opinions; decision/clinical judgment; nursing care conception; self-image; ethics, morality and values. Research preferences concentrated on themes in the first three categories.

Lopes (2001) also concluded that (1) the majority of the studies had not been published; (2) many of the abstracts did not identify the theoretical perspective underlying the research; (3) qualitative approaches prevailed; (4) some replication studies were identified whose results either confirmed or contradicted the preceding ones.

Even when taking into account the limitations of the analytical model that was used to perform this study, as it is questionable to split the subject from the context of action, (if only for analytical purposes), these three studies allow us to capture, on the whole, not only the main research interests, but also some obstacles, the more widely adopted approaches and the issues being scrutinized in nursing research in Portugal.

Conclusion
We may summarise the main conclusions that are obtained from a review of Portuguese research on nurses and the nursing profession in the following main ideas:

During the last 60 years, nursing history has been characterised by a radical change in professional empowerment, which affects and is affected by changes produced in the domain of nursing education.

Changes are felt mainly in the evolution of the profession and develop towards more regulation and more accountability, leading as well to social reconfiguration in the context of multi-professional Health Care.

The introduction of market-oriented management models is very recent. There are very few research results about the impact of these management models on the National Health System, namely on the consequences of their implementation on the life and work of nurses.

The main interest areas on nursing research are much more concerned with issues relating to professional identity (an extremely interesting area which supports multiple levels of reflection) than with issues emerging from restructuring processes imposed by liberal health policies or with the impact of these on health professionals.

Clearly defined research lines are tenuous, almost non-existing. Research results are not usually published, which affects access to research conclusions, thus harming the exchange of knowledge on nursing.
Chapter 6

Spanish Case Study: Teacher/Nurses Research Review

Jörg Müller, Isaac Marrero, Amalia Creus, Max Muntadas
Fernando Hernández and Juana Maria Sancho Gil

Introduction

The following report gives an overview of the recent changes of the Spanish welfare state in education and health as reflected in the scientific literature. A basic historical account of the main policy changes from the 1960’s onwards is included, without which the majority of the research literature reviewed would remain isolated and void of sense. Some overlapping with WP2 which focuses on the restructuring of the teaching and nursing profession in more detail is thus unavoidable, especially in relation to the demographic trends and the periodisation of welfare development as well as the reflection on the implications for the profession.

Welfare State in Spain

From a very coarse point of view, the discourse on restructuring in Spain might be characterised by not developing any own strong, theoretical point of view. The relative late rollout of the Spanish welfare system might be mirrored in a certain delay in its theoretical reflection leading to the adaptation of terminology developed in the continental and northern countries.

In this sense, the primary perspective on the Spanish welfare state is thus strongly oriented by the specificity of its social and political history. The relatively late development of the welfare state and its inauguration under the Franco regime stick out as the two most characteristic features. Instead of pinpointing a national definition of restructuring one can rather indicate some specificities of the Spanish situation.

Already during the Franco period the roots of the modern Spanish welfare state were planted. This implies that the Spanish definition is cut loose from the political model installed. Its dynamics are primarily understood as a consequence of the (late) process of capitalist modernisation from the 1960’s onwards. The welfare state was not strictly dependent upon the existence of democratic institutions, nor dependent upon certain levels of social spending, or the coherence to an archetypal welfare model. Rather, every model of economic growth – according to Rodrígues Cabrero – requires a mode of social regulation buffering the insecurities of the market (Rodríguez Cabrero, 2003:76-77, Gutiérrez Junquera, 2000). The Spanish model thus has to be understood as responding to this process of late modernisation.

A first implication can be seen in the paradoxical nature of the build-up of the welfare state. Indeed it has been noted repeatedly that the conflicting tendencies between economic efforts of industrial modernisation and welfare spending provide the backdrop for many policy decisions and social conflicts (Noruega, 2000:476; Rodríguez Cabrero 2003:9ff, Adelantado & Góma 2003:72). This
characteristic antagonism inherent in the Spanish welfare build-up already becomes apparent when considering that the roll-out of social welfare caught precisely the momentum when the existing Keynesian reference models of the continental and northern European counties entered in crises from the 70s onwards. The Spanish system thus faced the necessity to implement social policies that correspond to a modern, industrial production and economy, but at the same time imported the neo-liberal rhetoric of social cut-backs. The relative inferiority of the Spanish welfare state in comparison to other European countries remains a recurrent starting point for its critique.  

Apart from this internal antagonism between welfare spending and industrialization, the role of the central Government has been described as “weak” or decreasing. For one reason this is surely due to the decentralisation efforts undertaken after the end of Franco’s regime. But more importantly this also refers to the territorial disparities between north and southern regions in Spain and the survival of hierarchical differentiations and clientelistic collusions which traverse the Spanish society and prevent the State from providing universal “rights”. Looking at those aspects makes clear that welfare confronts a structural problem in Spain which Rhodes in echoing Ferrera terms the “southern syndrome” (Ferrera, 1996). “The development of social policies of various types – ranging from social security and health care to employment promotion – has occurred against this backdrop of social heterogeneity, territorial disparities and in the context of resource constraints and inadequately institutionalized state structures which have been based in many instances on clientelistic rather than 'rational-bureaucratic- forms of administration” (Rhodes 1997:8-15). That is, the Spanish state has a weak and fragmented administrative structure operating over a clearly north-south divided territory and confronts historically grown clientelistic complicities which diminish its role in functioning as mediator of social disparities and exclusions. 

Finally, the patchy public security network is related to another distinctive feature of the southern welfare model, the prevailing importance of the family (Martin,1997, Jurado Guerrero, 1997). Although it is again tempting to see the sole difference between Spain and the northern and continental European countries on an economic scale explaining the continued centrality of the family in terms of a substitute safety-net for non-existent or scarce governmental protective measure, the reality is more complex. As several authors have indicated, the importance of the family should be taken into account when discussing issues of restructuring because it cannot be reduced to a merely economic scale that would progressively be eliminated as the Spanish model approaches higher levels of social spending. Since the importance of the family also relates to issues of family-policy and cultural values including the continued importance of the church, kinship bonds and family values, it is most likely to sustain its imprint of the Spanish welfare system (Jurado Guerrero 1997, 43-56ff).

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16See for example the references in Navarro 2004
17Similarly the ESWIN report: “As a result, the current situation is one of great diversity, with different actions being taken by different administrative bodies having different structures. In many cases there are insufficient links between them and, together with the flexibility of the system itself, this has led to a situation in which it is difficult to identify and visualize the social services system” (The Spanish ESWIN Social Welfare Summary Fact Sheet, 2000)
Methodology

The review of research literature on teaching profession in Spain was organised according to the periodicities of main educational reforms. Those reforms provided the general framework for contextualising research where the latter often addresses specific problems and issues planted by the reforms (an example would be the study and evaluation of the different in-service teacher training programs as they respond to new realities brought about by educational reform). As will become apparent, the main institution for educational research in Spain is the Ministry of Education with the Centre for Investigation and Documentation of Education (Centro de Investigación y Documentación en Educación CIDE). Its output is far superior to any other sponsoring institution and it allows the establishment of a precise picture of the research undertaken over the years, since the classification of the work carried out is homogeneous and consistent throughout the decades (1980’s-1990’s).

According to the general framework of official education reform, the diverse bibliographic resources including PhD material, key journals, etc. were revised in so far as they treated changing teachers’ profession. Entries into the field were not bound to disciplinary boundaries but equally carried out from sociology, educations sciences, anthropology, politics, economics, etc. In difference to some English language services, there is no central agency (like Ingenta or ESBCO Academic Search Primer) that would bundle journal abstracts of the Spanish speaking countries and make them easily accessible. A central database exists for the publications in education, but not for the other disciplines of the social sciences, let alone nursing.

The CIDE catalog on Spanish education research also allows indication of possible relations between research and the political agenda. A certain parallel can be established between the political orientation of the Government and the research financed. During the PSOE period from 1982 until 1996 due to the huge task of the educational reform to be accomplished, very active and busy research program was carried out on the effects and possibilities of the LOGSE. The most decisive change in the mid 1990’s in education research was the emergence of research on school effectiveness, basically non-existent previously. This coincides with the first period of the conservative Government (PP) from 1996 onwards which bears clear signs of neo-liberal tendencies. Most telling, however, is the fact that state financed research basically stops in the year 2000 after the first legislation of the PP and the arrival of a new ministry for education – for whom further research in education in Spain is not necessary since the education system has a clearly specified problem, to be solved by educational reform (LOCE) approved in 2002.

Research review in nursing was carried out by contacting first with related key researchers and persons in Spain. According to their initial orientation which established the general framework of the main reforms and decisive events, the literature review was organised, mining general libraries and libraries of nurses colleges specifically and TESEO and TDX databases for PhD thesis. We also reviewed trade union’s documents (mainly SATSE, the biggest nurses union) as well as legal texts to try to complete the scenario.
Most of the research covered has been done in universities, by individual researchers. There has not been any sustained national research program in the field. Private studies are also scarce (COIB, 2005). The research trend has been, more than anything, to be marginal and low-cost: there are no big surveys, not many prolonged studies and most of them depend on the researcher’s field study and previous knowledge (e.g. Irigoyen 1996, Antón 1998, Medina 1999…). Therefore, nobody can speak strictly of periodisation of the research on nurses, since this research is clearly underdeveloped and merely “visible.”

**Teachers Research Review**

**Time and Periods of Educational Reform in Spain**

*Periodisation* of the Spanish teaching profession only makes sense on the backdrop of official educational reform undertaken already during Franco’s regime and since 1978 by the democratic Government. The overwhelming majority of 74% of non-university teachers are employed by the state (Ministerio de Educación y Ciencia (MEC) 2002:102). In addition, although there has been a process of decentralisation under way which delegates administrative authority to the Autonomous Communities of Spain, critical aspects such as the curriculum design are still managed by the central government. Consequently, it is State directed public policy which sets the framework for professional experiences of most teachers. Altogether, one can distinguish three main educational reforms: the first one undertaken by Franco’s regime (*Ley general de Educación* -LGE), the second mayor one by the Spanish socialist party in the year 1990 (*Ley Orgánica de Ordenación General del Sistema Educativo* -LOGSE) and the third one undertaken by the Spanish conservative party in 2002 (*Ley Orgánica de la Calidad de la Educación* - LOCE).

- **1958 – 1975** Pre-democratic Period / LGE
- **1976 – 1981** Transition to Democracy Period/ Redefinition of LGE
- **1982 – 1990** Socialist Government: searching for Comprehensive Education / LOGSE
- **1991 – 2004** Neoliberal tendencies / LOCE
- **2004 –** Reformist tendencies /LOE

**1958-1975 Pre-democratic Period**

Already during the Franco regime the roots of welfare provision for education were planted. Its logic followed the general installment of welfare implied by capitalist modernisation. The period of the 1960’s witnessed rapid economic growth; the income per capita increased by 350 percent and the working population underwent radical transformation in correspondence to the general industrialization of the country (migration to continental European countries and
to South America, rural migration to the cities) (Rodríguez Cabrero 2004:76-77).  

The main obstacle as detected by some members of the Franco regime (Opus Dei, ‘technocratic ministers’) was, however, the non-existence of a sufficiently skilled work force. The need to educate the working population in order to not completely lose contact with the continental European capitalist economies led to a quite polemical discussion and finally to the approval of the General Law of Education (Ley General de Educación LGE) in 1970. It followed the general trend of Franco’s regime to introduce different measures of rudimentary welfare provision in order to regulate and push for economic growth and capitalist modernisation on the one hand, balancing at the same time the social demands connected to a large work force and the insecurities of the market. The first substantial educational reform since the Education Act of 1857 basically extended compulsory education to the whole population from age 6 to 14 aiming at preparing young people for labor market entry.

The main difficulty that plagued the implementation not only of this but other subsequent educational reforms was lacking financial support which rendered it somehow inoperative and sterile. In part this was caused by the internal resistance of the conservative wing of the Franco regime and in part by the economic recession that affected all countries in the beginning of the 70s.

1976 – 1981 Transition to Democracy Period
With Franco’s death in 1975 and the Constitution approved in 1978 the Spanish welfare state took a huge step forward. The basic social rights were inscribed into the Constitution which converted the authoritarian embryonic welfare state into a democratic one, having now at its disposition adequate democratic channels to express and negotiate social demands.

The Constitution established the right to education for everybody and more importantly initiates a process of decentralisation of educational power between central Government and Autonomous Communities (Eurydice 1996, Rodríguez 2001ª:49, Gallego Herrerz 1995). Decentralisation has to be seen as part of a more general process of democratisation of Spanish society. Since Franco’s regime suppressed all political ambitions which questioned the union of the nation, granting autonomy to the different regions of Spain was of prime importance for making the transition towards a democratic society. Regions which had a strong cultural identity (strong economy, own languages like Bask Country, Galicia and Catalonia) achieved almost automatically an autonomous status whereas other regions followed and follow more slowly up to the present day.

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18 The year 1967 also saw the real substantial increment of welfare provision by establishing the social security systems (Ley de Bases de la Seguridad Social) modified and extended in subsequent years.
19 See O’Malley 1995; Marchesi & Martín 1998:432-5

The socialist party Partido Socialista Obrero Español (PSOE) – winning the general elections of 1982 with an absolute majority – further carried on the transition of the Spanish state towards a democratic society. The Organic Act on the Right to Education (Ley Orgánica del Derecho a la Educación LODE) – approved by the parliament in 1985 – articulated the basic educational rights set forth in the Constitution. It granted all Spaniards the right to a free basic education; in addition it established a network of public and private schools to guarantee this right to education; finally this act regulated the participation of the educational community in the control and management of schools financed with public funds.

Nevertheless, inconsistencies persisted in the educational system ruling by LGE. For example, obligatory education ended at age 14 when the official working age was fixed at 16 years. In addition, the division of competencies in educational matters was far from clear between the central government and the regions. And last but not least, the structure of the bachelor and professional formation established by the LGE in 1970 required a reform since it was too much tied to academic content on the cost of other professional formation.

Against this background a process of intensive debate and experimentation towards educational reform was initiated by the PSOE which lasted from 1983 until 1986 and involved the active participation of schools and teachers. It followed a bottom-up strategy giving the educational community a decisive role in shaping the planned reform and thus strengthening the overall democratisation processes of the country. From 1983 onwards each school term approximately 25 schools joined the effort and participated in the definition of educational objectives and curriculum design (Marchesi & Martín, 1998:436. This experimental phase in addition counted on established strong movements of pedagogical reform which played a major role as opposition force during the 1970’s of the Franco regime, the so-called Movimientos de Renovación Pedagógica (MRPs).

Teachers especially reached a high of implication and active participation in three areas: i) Active participation in the design of an open and plural curriculum and educational materials. ii) Teacher training. In 1984 the Teachers Center (Centros de Educación del Profesorado CEP) were established in close physical proximity to teachers and with the help of the MRPs, which guaranteed their progressive agenda, closely associated to the daily pedagogical practice in schools. iii) Research undertaken by teachers. Based on foreign literature teachers got involved to further undermine the technocratic character of the LGE and understand educational research as one further aspect of the professional role of teachers.

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As several authors have indicated, this experimental phase from 1983-86 was *characterised* by high aspirations to turn into reality a change towards a progressive educational system. However, to the degree that those educational “grass-roots” experiences entered into legislation, the plurality, openness, and autonomy would be replaced by a more centralised, administrative and technocratic approach causing major disillusion and frustration among many of the more progressive educational protagonists in Spain.\(^1\)

In 1990 the *Organic Act on the General Arrangement of the Educational System (Ley Orgánica de Ordenación General del Sistema Educativo LOGSE)* was approved by the parliament regulating the structure and organisation of the Spanish education system at non-university levels. As such it replaces the 1970 *General Act on Education*. The objectives of the LOGSE consisted in: i) extending compulsory education to the age of 16 ii) change of the structure of the educational system now consisting of 6 years of obligatory primary education, 4 years of obligatory secondary education, and a choice of either two years of bachelor or vocational training. iii) an in-depth reform of the vocational training in general iv) define the factors for quality improvement of education v) adapt the curriculum, and vi) establish measures of equity (MEC 2002:10).

It should be noted that the application of the LOGSE was planned between 1990 and the year 2000 with its institutionalisation to be finished by the year 2004. In these terms many experiences of and research about teachers has to be seen in the context of this major educational reform.

**1991 – 2003 Neoliberal tendencies / LOCE**

Although the most critical voices of the educational reform already detected neoliberal currents in the politics that led to the approbation of the LOGSE by the socialist party in 1990, the period from 1991 onwards was marked by two decisive events which make it more plausible to speak of cut-backs and neoliberal forces during the subsequent period.

First, with the change of the government from the PSOE to the conservative *Partido Popular* (PP) in 1996 educational expenditure was basically frozen. The politics of austerity executed by the PP implied a steady decrease of public spending in education from 4.7% of the GDP in 1996 to 4.4% in 2004 situating Spain well below EU-15 average of 5.4% (MEC 2004b:11, Navarro 2004:10, Bas Adam 1997). At the same time Government support for private schools with public funding was increased – especially for those of catholic confession.\(^2\)

Second, the PP set forth its own educational reform, the *Organic Act on the Quality of Education (Ley Orgánica de la Calidad de la Educación, LOCE)* approved by the parliament in 2002. It made substantial changes to the LOGSE emphasising individual responsibility and effort in the educational process, intensifying pupil's assessment processes, and conceding more autonomy to educational establishments in financial and administrative terms. In addition, the

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\(^1\)Curriculum design was again strongly prescriptive and unified; teacher training got disconnected from teaching praxis and converted into a mere “collection of points” for salary promotion; See Rodríguez 2001a:63-8

\(^2\)Public funding of private schools increased in 1997 by 1,6% whereas funding for public schools decreased at the same time by -2,0% (Bas Adam 1998:82)
politics of the PP aimed at the alignment of educational quality to customer (parent) satisfaction by giving schools for example more autonomy to select their students (Viñao Frago, 2001, Torres, 2003).

Reformist tendencies /LOE
With the dramatic change of power in 2003 when the PSOE replaced the PP after a eight years period in government, the implementation of the LOCE was stopped. Currently, the PSOE has initiated a new phase of debate with the educational community towards adapting and reforming the LOGSE. Therefore, the LOGSE has established the juridical framework in which most research on teachers has been conducted. As mentioned, the conservative party undertook its own educational reform approved in 2002. However, the stop imposed by the PSOE in 2004 means that its implementation has been paralyzed and consequently, that research on professional knowledge was not exposed to the implemented changes of the LOCE. When we write this report, a new Law, it has been sent to Parliament, the Organic Act of Education (Ley Orgánica de la Educación, LOE) and it is under discussion.

Demographic Trends
In the following paragraphs basic statistical data for non-university teachers in Spain will be presented. The data is arranged according to sex, age, class, type and place of work. Statistical information is very hard to come by especially for the years of dictatorship. Only few data resources predate the 1980’s. Although the considerable number of statistics and official research about teachers allow to construct a general idea of the present demographic situation of teachers, a more historical perspective is missing.

Demographic Profile of Spanish Teachers

Number of teachers and students
According to data from the academic year 1998-99, teachers represent 4.5% of the total of the working population in Spain. If university staff are excluded, this figure is reduced to 2.8%. There has been a considerable growth of non-university teachers during the last ten years of 19.51% in both public and private institutions as shown in the following table.

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<tbody>
<tr>
<td>Maestros&lt;sup&gt;23&lt;/sup&gt;</td>
<td>212,971</td>
<td>218,496</td>
<td>227,510</td>
<td>230,881</td>
<td>8.4%</td>
</tr>
<tr>
<td>Prof. Secundaria&lt;sup&gt;24&lt;/sup&gt;</td>
<td>119,291</td>
<td>149,094</td>
<td>163,378</td>
<td>167,182</td>
<td>40%</td>
</tr>
<tr>
<td>Prof. FP&lt;sup&gt;25&lt;/sup&gt;</td>
<td>20,223</td>
<td>20,043</td>
<td>20,511</td>
<td>20,427</td>
<td>1%</td>
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<sup>23</sup>Maestros comprises teachers for pre-scholar and primary education age 0-11
<sup>24</sup>Profesor comprises teachers for secondary education age 12-16. Secondary education is obligatory until age 16
<sup>25</sup>Profesor also refers to teachers for vocational education. Those three categories make up the total of teachers working in public schools.
The number of teachers in public schools is considerably superior to that of teachers in private schools. Almost 73% of the Spanish teachers work in public schools. The proportion of three out of four teachers working in the public school has remained fairly constant over the last decade as can be seen by the equal increase of teachers in private and public institution.

In contrast to the important increase of teachers, the number of students with a school degree has decreased. In part this is due to the constant decline of the birth rate in the same period. However, even if that has been the tendency in the past years, as it can be seen in the following table, it is important to notice that such tendency is subject to changes, especially if we consider the increasing numbers of foreign students, as well as the recent growth in the birth rate and adopted children.

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<tbody>
<tr>
<td>Private Education</td>
<td>2.450.779</td>
<td>2.285.077</td>
<td>2.216.261</td>
<td>2.211.361</td>
<td>2.216.562</td>
<td>2.224.572</td>
<td>2.220.419</td>
<td>2.242.021</td>
</tr>
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</table>

Table 2 Total numbers of pupils. Source: MEC 2004c.

**Average Age**

Another important aspect is the age of Spanish teachers. While data from 1993 indicated that the average age of teachers was 37.8, recent studies show a slight increase in age to 39 years, the same as the average age of the Spanish population (Pérez Gómez et al., 2004:129). Such data permit the confirmation that a good part of the teachers active in Spain were born around 1966 and have a professional life of 14-16 years of activity. So it is likely that such teachers that have initiated their professional career in the eighties were directly affected by the educational reforms that took place in this period.

**Social Composition**

Concerning the social and cultural profile of the teachers, the sparse data available seems to indicate that teachers come primarily from the lower classes. The teaching profession still does not attract a great number of students with higher grades or coming from the more affluent section of society. Choosing a teaching career is the alternative for many that cannot access to other more difficult university level careers, a fact that confirms the perception of the low
social status that characterizes the teaching profession (Pérez Gómez et al., 2004:138).

**Gender Patterns**

Regarding the division by gender, there is still a tendency to increase the percentage of women in education. As in other European countries, women find in teaching positions one of their main categories of employment. In Spain, women are still the majority in Children Education, Primary Education and Special Education, half of the teachers in High School and Professional Education, but still a minority in University positions. One can also verify that the presence of women has historically been always more numerous in the first years of school formation, while their incorporation to other fields has taken place later. The following table shows the percentage of women in each category, as seen in the year 2000/2001.

<table>
<thead>
<tr>
<th>Category</th>
<th>2000/2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-primary and Primary Education</td>
<td>77.5%</td>
</tr>
<tr>
<td>Secondary Education</td>
<td>51.8%</td>
</tr>
<tr>
<td>University</td>
<td>33.7%</td>
</tr>
<tr>
<td>Total</td>
<td>59.7%</td>
</tr>
</tbody>
</table>

*Table 3. Percentage of women according to educational level.*

Source: MEC 2004a

Therefore the percentage of women in Children and Primary Education is clearly predominant. In fact, the feminine presence in these educational levels represents 77.5%, and 95% if we consider only Pre-primary Education. Regarding Secondary Education, we can see that the number of women is constantly increasing. While in 1998/1999 there were 58% of men and 42% of women, in 2000/2001 women were already a majority, representing 51.8% of the total number of teachers. In teaching positions at University level, the number of women is also rapidly increasing. In the last twenty years women’s percentage increased from 20.7% to the current 33.7%. This leads to the conclusion that there is a clear process of “feminisation” of the teaching profession under way, especially in the field of Primary Education. If women are still considered the responsible for child care at home, such responsibility also extends to the school.

On the other hand, when considering the presence of women in the direction of educational centers, the process of “feminisation” is inverted. According to data from the Women’s Institute (MEC 2004a), the percentage of women in directorial positions, even if it has grown steadily in the last years, is not proportional to the number of women teachers in all educational levels. Even in the fields of Primary and Pre-primary education, where there is a slight majority of women in directorial positions (51.5%), women are still underrepresented because the percentage is much below the correspondent number of female teachers.
teachers. In fact, data from 2001 confirms that almost three quarters of the
directors of public institutions are men over 40 years of age. Such pattern of
under representation increases as the educational level increases: the higher the
position, the less frequent it is occupied by women. In private centers,
considering both primary and secondary education, the division of directorial
positions is more balanced: 50% men and 50% women.

Thematic Analysis of Literature on Teachers and Restructuring

Spain has a rich history of educational research including investigations about
and by teachers. However, research that would specifically address welfare
restructuring and its possible effects on teacher's professional knowledge is rare.
On the one hand there are discussions on a more or less theoretical level
concerned with neo-liberal tendencies of the state and their possible
repercussions for education in general and teachers more specifically (Navarro
Fernandez 1997; Torres 2001). On the other hand, research often frames the
subjective experience of working conditions of teachers sometimes in their
relation to educational reform (Esteve et al., 1995, 1987, Manassero Mas 1994,
are the changes in the educational practice of teachers brought into relation to
changes on a more macro-economic, global scale. Part of this specific Spanish
research configuration surely resides in the relative young welfare state where
educational reform was less inspired by economic factors but rather followed the
political necessity to transform a centralised, dictatorial- into a democratic
society. It was thus first of all those policy driven concerns that provided the
perspective from which teachers and teaching were examined.

Thematic Overview: State Financed Teacher Research

There exist four to five main research lines in Spain that have teachers as their
object of study. Those thematic priorities are derived from the state financed
research by the Ministry of Education (MEC) which does not cover all the work
done but nevertheless allows establishing a representative overview of the main
topics covered due to its far superior output in comparison to any other
sponsoring institution. Quantitatively, research about teachers enjoys a high
priority. In the years from 1993 to 1997 the Center for Investigation and
Documentation of Education (Centro de Investigación y Documentación en
Educación CIDE) of the Spanish Ministry of Education financed 42
investigations about teachers, far more than in any other area of educational
research (35 in school effectiveness, 34 in psychology and education, 31 in
equality in education, etc.). When comparing to the previous decade (1982-
1992) one can confirm a relative increase. Investigations on teachers had in

27See for the following the research reviews compiled by Egido Gálvez [et. al] 1993 covering the
entries in database maintained by the CIDE (Center for Documentation and Investigation in
Education) which stores all state financed investigations reach up to 2001. No data is available
between 2002 and present.
percentual terms to other topics less weight: 41 investigations were dedicated to teachers compared with 61 on didactics, 59 on school effectiveness, 55 on psychology and education in those preceding years. Zooming in on the details on teacher research the following thematic subdivisions can be discerned, where (1) teacher education, (2) job satisfaction, and (3) teaching practice make up the most important share from 1982 onwards. Starting with 1993 research interests also begin to emerge for (4) school leadership, and (5) evaluation of teachers – investigations clearly underrepresented in the previous years (Cerdán Victoria 1999:31).

Concerning the theoretical framework underlying teacher research three periods can be distinguished in Spain (Hernández 2004:7). Whereas until the mid-80s research concentrated predominantly on the efficiency of initial education for teachers, from the mid-80s to the mid-90s research was preoccupied with “what teachers think.” It focused consequently on the rationalities and strategies that guide teachers in their work and which function as base for generating knowledge in and through their practice. It seems important to note that during this period as well as during the previous one, research was predominantly descriptive and explicative in its ambition independent of methodological orientation (qualitative or quantitative studies). Very few investigations undertook the labor of generalisations and even less undertook attempts to elaborate intervention strategies which could possibly change the encountered state of things (Egido Gálvez 1993:81, Cerdán Victoria 1999:102). Finally, in the third period from the mid-90s to the present, investigations take into account the biography of teachers.

In what follows, the general research lines on teachers in Spain are outlined, some of which will be more profoundly developed in the thematic analysis of professional knowledge later on.

Teacher Training
As mentioned, teacher training constitutes the most important research line about teachers in Spain. Opening concerns were targeted towards elucidating the role and importance of initial professional formation for teachers from the 70's onwards. Some of which focus on the access of students to the Escuelas Universitarias de Magisterio (Colleges of Education) (Anaya Santos 1982, Noguera Arrom 1984), or investigations which deal with the different institutions themselves which impart the initial teacher education (Albuerne 1987). Two investigations deserve special attention in that they incorporate a comparative perspective of initial teacher training with other European countries (Prieto Arroye 1988, Riaza Ballesteros 1986).

Slowly research shifted during the 1980’s and its attention moved towards the practicing teacher who is situated in the classroom and confronted with challenging social and pedagogical tasks from which knowledge is derived. Some exemplary work includes: Sánchez Miguel (1994), Barrón Ruiz (1995) who studied the different discourses, strategies, and didactic methodologies applied by teachers to ease and facilitate the learning process of students; Colera Jiménez (1997) prepared a program of self-training for teachers; and Martínez

28As a curious fact, the online database by the MEC which collects all educational investigations does not provide any newer information than 2001.
Aznar (1997) writes about the different levels of acceptance of the initial practical training among teachers.

From the cited investigations it is apparent that the overall research tendency has been on the practicing teacher, a fact which is underlined by the shifting numbers of investigations that focus on continuing training instead of initial education. Whereas in the period from 1982 up to 1992 both research lines were almost equally represented, in the period from 1992 up to 1997 only five investigations dealt with initial teacher training against 25 investigations on continuing in-service training.

An important portion of teacher research in this period was also dedicated to the evaluation of the different programs of in-service training. These investigations can be divided between evaluations of the Teacher Training Centers (CEP) undertaken by Morgenstern Picovsky (1993a), Moreno Herrero (1995), Gibaja Velázques (1995), Saez Brezmes (1996), Herández Franco (1997); evaluations of teacher training programs designed by the MEC done by Villar Angulo (1994), Porlán Ariza (1995); and evaluations done by Marcelo García (1994) and San Fabián Maroto (1994) which examine the teacher training programs that are carried out in schools themselves as a close process of counseling for educational innovation.

More recent research takes into account the relation between teacher training and personal trajectories. Among the first, Fernández Rojero (1996) focused in an ethnographic case study on the specific contexts and circumstances in which professional development takes place; Bolívar Botía (1997) in turn concentrated in a qualitative study incorporating extensive biographic material on the professional development of teachers in relation to their personal life cycles. The latter pleads for a flexibilisation of in-service training options to adapt better to the specific necessities of the personal history of each teacher. Rivas Flores (1998) approaches in a qualitative, biographical study the professional development of teachers in relation to their practical teaching work which remains heavily oriented by academic discipline, the interaction with colleagues and students, and the educational reform. Soutu González (1998) in turn concentrated in more theoretical terms on the feasibility of in-service teacher training which is based on teachers lead investigation; Vicente Rodríguez (1998) develops an alternative evaluation framework for teacher training programs that are based on a internal, self-propelled model of educational change which implies teachers in a substantial manner. The author signals the non-existence of evaluation frameworks in Spain that differ from the common, interventionist model where teachers are trained by external experts. Jesús Domingo Segovia (2000) incorporates teachers’ own perspective in his study on special training needs of teachers working in disadvantaged areas. To complete the overview: Álvarez Castillo (2000) examined in a quantitative study the efficiency of a certain teacher training program for improving cognitive skills when dealing with cultural stereotypes. Alonso Tapia (2000) developed a teacher training program for assessing and evaluating the cognitive capacities of students especially in the social sciences.

**Job satisfaction**

With job satisfaction, the second out of the three most important research lines
on teachers is presented. Thematically it is structured according to three subdivisions between i) the perception of teachers about their own profession and working conditions, ii) the professional trajectory of teachers, and iii) the social recognition and image teachers enjoy in wider society. Investigations that examine how teachers perceive themselves and their profession vary in turn between a psychological perspective exemplified by Manassero Mas (1994) and Esteve (1987, 1995) concentrating more on personal factors of stress and burnout; a more sociological approach exemplified by Fernández de Castro (1995) who concentrates on the relation between social class, teaching practice, self-perception, vocation/profession on the one hand and educational reform on the other; and finally an attempt to merge the psychological with the broader sociological perspective in the quantitative based work of Pérez Pérez (1997).

The primary reason teachers give for choosing their profession is *vocation*, a fact that might explain why most teachers remain despite the formulated difficulties very satisfied with their job. They perceive it in terms of personal self-fulfillment and actually less than 10% would change their profession. The recurring topics of dissatisfaction, however, point to insufficient initial and continuing education, the lack of cooperation and participation with the wider school community, and the underdeveloped classroom practice in general. This is also confirmed by more recent surveys where teachers voice again their principal lack of preparation for dealing with changing student populations (including issues of violence), their discontent with the lack of cooperation inside the school but also between school and parents, and the low social prestige teaching receives in the wider society.

Various authors have written about the effects educational reform has on the vertical mobility of teachers. Miguel Díaz (1992) writes about personal resistance of teachers against educational reform. Morgenstern Pitcovsky (1995) treated professional development on a personal level, where individualistic and bureaucratic concerns seem to dominate, and in relation to educational reform where many teachers identify with its goals but fail to carry them into their practice and hence their own agenda of professional development.

Finally, the role of mass- and popular media in their relation to the wider societal perception of teachers has been studied. Both authors – Cabero Alemnara (1996) and Bravo Ramos (1996) note the cleavage that exist between general disinterest in educational matters by society and the importance and expectations attributed to education by teachers themselves.

**Teaching practice**

Towards mid-90s a relative large number of investigations were dedicated to teaching practice. As outlined in the introductory paragraph the goal consisted of elucidating “what teachers think” and thus take on the “how, when, what” to teach and evaluate from a quite personal point of view. Teachers in this context

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29See González Blasco 1993
30CIE-FUHEM/IDEA 2001, 2004a, 2005; Federación de Enseñanza de CC.OO. 1993, 2000; Pérez Gómez (2004) indicates that 89% of teachers are dissatisfied with societies esteem of the teaching profession, followed by 77% being dissatisfied with administration and academic results of students. The strongest satisfaction (87%) teachers find in their working relations with colleagues and the school calendar (77%) respectively. See also Barquin 2002.
are considered reflective agents who take decisions and elaborate theories about learning immersed in a reciprocal relationship with their students. Although the analytical framework in which teaching practice was examined came to include, the wider micropolitics of the school\textsuperscript{31} or the necessity to work in teams,\textsuperscript{32} the focus has remained predominantly on the individual teacher and his/her capabilities and rationalities.

Investigations during the 1990's were strongly influenced by the effect of the educational reform LOGSE. As a result, the elaboration of the curriculum on the school level following the general guidelines set by the ministry of education and the elaboration of didactic materials attracted some attention by Yuste Llandrés (1992) and Medina Rivilla (1993). The latter especially pinpoints the imbalance teachers experience between their self-perception as facilitators of dialog and the requirements of the curriculum provoking a personal crisis in many teachers. The study sees this, however, primarily in relation to the personality of the teacher in question. In addition, the evaluation of students has also been seen in relation to educational reform as embarked upon by Álvarez Méndez (1993), Mauri Majós (1996), Buendía Eisman (1997).

**School leadership**

Research on school leadership surged in the mid 1990's in Spain and can be understood as indicating the increasing preoccupation with "effectiveness" and "control" of schools.\textsuperscript{33} Whereas only three investigations were undertaken in the period up to 1992, a total number of seven studies took place from 1993 to 1997. From 1998 until 2001 a total of 16 investigations were finalized, 11 alone in 1998. Research was predominantly descriptive, and topics include an approximation to the tasks of the headmaster and his/her team, educational needs of headmasters, and their self-perception. In corresponding order Gimeno Sacristán (1994), Gairín Sallán (1994), and Bardisa Ruiz (1995) accentuated their research. Especially the latter described the low prestige and reluctance of many teachers to ascend to headmasters due to lack of skill and training, lack of economic compensation in relation to workload and responsibilities, and the complexity associated with directing schools. Joan Teixidó Saballs (2000) studied the personal and intellectual reasons candidates list for aspiring to the job of school headmaster. The overall findings conclude that there are very few common indicators, but rather each trajectory has to be understood in the context of the schools history.

**Evaluation of teachers**

Research on evaluation of teachers was practically inexistent before the 1990's. In the subsequent period, however, some defining characteristics and problems of teacher evaluation could be defined, although the number of investigations undertaken is far minor to the first thee preceding areas. In addition, it should be noted that most of this research is focused on university personal. For schools Mateo Andrés (1995) noticed the complexities involved in establishing an evaluation framework which presupposes a consensus of the wider educational community (teachers, administration, parents, students) in order to be effective. Estaban Frades (1996) evaluates the role of primary teachers in a much wider

\textsuperscript{31}See Anderson and Blase 1994, Santos Guerra 1994

\textsuperscript{32}See Martinez Bonafé 1995
framework, that is, within the changes brought about by educational reform and their implementation by teachers.

**Decentralisation / Marketization**

Decentralisation in Spain has to be seen under the peculiarities of the late process of modernisation and democratisation. As indicated, approval of Autonomous Communities in Spain followed the need to disarticulate the highly centralised state structure. Regions with a strong cultural identity such as Catalonia or the Bask country received automatically the status of autonomous region shortly after the constitution was approved whereas other regions followed over a larger period of time. In terms of education the distribution of competencies has finished only recently in the year 2000 for all 17 regions.

As an introductory note it should be mentioned that decentralisation for education does not enjoy special attention in the research literature. Although many studies of teachers are located in a specific region and seldom encompass the whole of the Spanish territory, a comparative perspective between Autonomous Communities and teachers is not present in the literature. In part this lack of research stems from the fact that the transition of competencies between State and Autonomous Communities has just been fully accomplished in the year 2000.

**Distribution of Competencies between State and Autonomous Communities**

Following a federal model, the State establishes the general framework and has to guarantee the right and equal opportunity of all citizens to education. The Autonomous Communities in turn are “free” to develop and execute their educational program within the general guidelines established by the State (municipalities play no significant role in this distribution of competencies). This autonomy of the different regions throughout Spain, however, affronts severe limitations which question above all the level of decentralisation achieved in terms of educational goals, ideas and programs. As it turns out, decentralisation has to be understood first and foremost in administrative and financial terms, for content related competencies like curriculum design, one rather has to assert a strong recentralisation.

First, 55% of non-university curriculum is defined by the Ministry of Education which thereby established the minimum thematic requirements for the whole Spanish territory. The remaining 45% can be used by the Autonomous Communities after complying with the official standards.

Second, although several administrative boards have been established that should guarantee the participation, communication and coordination between regions and the central Government such as the Conferencia Sectorial de Consejeros (Conference of Consolers of Education from Autonomous Governments) or the Consejo General de Formación Profesional (General Council of Vocational Education) a general lack of cooperation between State

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33 See Torres 2001:72ff
34 See the introduction of Informe Educativo 2004 of the Fundación Hogar del Empleado which emphasis the lack of comparative data between Autonomous Communities.
35 See Puelles Benítez 2004:19f.
36 See Pedró 2004:189; Torres 2001:.46
and regions can be attested.\textsuperscript{37} In the case of the elaboration of the LOCE – the educational reform planned and executed by the Spanish conservative party in 2002 – the Conferencia Sectorial de Consejeros was only used by the Ministry of Education as mono-directional channel of information instead of initiating a debate between all involved parties. Similarly, the Consejo Escolar del Estado (State Educational Council), which unites the different representatives of the educational community, does not take into account the distribution of competencies between State and regions. It therefore is not aware of the problems each autonomous region has.

Last but not least, financial responsibility for education lies with the Autonomous Communities.\textsuperscript{38} In 2001 83.7\% of public spending in education was administered by the Autonomous Communities, whereas in 1990 this participation was as low as 50.9\% (Calero & Bonal 2004:.219). As will become apparent in the section on privatisation, differences between the regions in financial matters are mainly due to the participation of private capital in education. Apart from that, the finance of education is a critical point of debate between the regions and the central government. In the last educational reform, the conservative party having the absolute majority in parliament approved the LOCE without also securing its financial plan. Autonomous Communities thus saw themselves confronted with taking on additional financial charges due to state imposed obligations (Calero & Bonal 2004:.216).

In summary, the decentralisation of the educational system in Spain concerns first of all a bureaucratic, administrative, and financial dimension, lacking in general a political will to establish dialog, collaboration and sharing of competencies between the state and the regions. Decentralisation in terms of shared competencies in curriculum design seems more restrictive. This pattern does not change when considering teachers in more detail.

**Decentralisation and Teachers**

Given the fact that teachers are employed by the state, the competencies of the Autonomous Communities in terms of making decisions that would affect the working conditions of teachers are very limited. Salary, working hours and vacations, pensions, professional career, mobility, etc. all that define the general working conditions for teachers are regulated by the central State. Therefore it should not surprise that the changes brought about by decentralisation of the educational system have not had any major repercussions for teachers in relation to the autonomous region where they exercise their profession. Where differences between the regions can be detected, they concern primarily supplementary payments to the base salary which is quite homogeneous throughout Spain and the distribution between teaching time and vacations.\textsuperscript{39}

\textsuperscript{37}See Blasi 2004:.68ff
\textsuperscript{38}From 1992 until 1999 the relative share between central administration and the administration of the Autonomous Communities was pretty stable. Whereas in 1992 the public expenditure for education amounted to 4.8\% of the PIB, 1.9\% was assumed by the State in contrast to 2.5\% by the regions. In 1999 the state expenditure has slightly diminished to 1.0\% in contrast to 3.2\% of the regions. See Tiana Ferrer 2004:49
\textsuperscript{39}Lezcano López & Gordillo 2004:121 The fact that not much can be said about differences between the regions concerning teachers gets also apparent by the cited article itself which ends up providing a reflection on the general teachers for the future instead of analyzing the situation of teachers in the different Autonomous Communities.
The specific supplements to teachers’ salaries vary between Autonomous Communities. In its majority the supplement comprises a common amount for all teachers in combination with a specific amount related to teachers position (e.g. headmasters), and a certain amount assigned every fifth-year or six-year seniority in the teaching profession coupled to in-service training. This final component is called the *quinquenio* or *sexenio* (five and six years of working) and teachers eligible for it must prove that they have taken at least between 60 and 100 hours of in-service training every six years.

The base salary and the job supplement are the same in almost all the Autonomous Communities, while the specific supplement and that for training vary from one region to another. This leads to salary variations between civil servant teachers according to the regions where they work. The differences are caused among other reasons by the different manners in which the standardisation of emoluments for teachers with the rest of the public officials of the corresponding Autonomous Community has been carried out.

**Privatisation**

As indicated, Spain resides well below the EU average public spending in education. In part this is due to the general inferior levels of social welfare spending in Spain (which can be related to the late roll-out of the welfare in general) but also to the relative high percentage of private schools. Besides schools which depend entirely on private funding, there exist schools which are private but receive public funding, called “*concertada*”. The low levels of public spending in combination with an extensive spread of *concertadas* make household contributions to education especially high in Spain. In fact, Spain had in 1998 the highest level of household contributions to be found in the European Union only inferior to other OECD countries such as Australia, Japan, United States, and South Korea (OECD, 2002).

The polemic of privatisation gets especially virulent with the last educational reform approved by the conservative party in power from 1996-2004. Primarily because the LOCE disqualifies age 0-3 years from the public educational system. This means that the State does not have to provide for this phase of education and leaves responsibility to the market, i.e. private kindergardens. This also implies the de-professionalising of pre-scholar teachers in that no qualified personal are necessary for attending this age group of children (Carbonell Sebarroja, 2003).

The effects of a strong separation between public and private schools can be observed in the segregation between immigrants and lower class pupils, and

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40 *Real Decreto Legislativo 1/1995*

41 Historically, the private sector in Spain is very strong in education. In some Autonomous Communities such as Catalonia or Bask Country up to 41% respectively 51% of all pupils in education attended private schools (1994/1995) which ranged from simple schools in flats “to well-appointed, expensive religious schools, such as the Jesuit schools for boys, or the Scared Heart Convents to for girls.” O’Malley 1995b, p.36; detailed figures in Villarroya Planas (2000:138ff). Although the democratic ambitions of educational reform foresaw the slow conversion of private schools into public ones, this goal has not been achieved. Rather, “the Government conceded far too much to the religious schools who, with the backing of the hierarchy […], conducted a full-scale offensive in an attempt to retain their privileges and, to a large extent, succeeded in doing so.” Ibid:38 See also Hernández Guarch 2004:136ff.
students coming from the middle and upper class. A central policy implied in privatisation of schools consists in the free choice parents supposedly should be able to exercise when selecting between schools for their children. According to the neo-liberal logic, this free choice of “customers” (parents) will increase competition and in the end the quality of education between different schools. Despite the importance free choice of school enjoys in the literature, in the current Spanish legislation – even including LOCE – there are no fundamental changes. Spaniards have the possibility to choose between public schools assigned according to neighborhood zones or choose a private school (concertada). A system of punctuations enables private schools to choose to some degree their students. The main aspect leading to class segregation, however, is the financial contribution required by concertadas and the dominant reason according to which parents choose the schools for their children, namely close proximity to their neighborhood. The socio-economic barrier which supposes private schools (concertada) by charging a certain fee directly to families in combination with neighborhood-choice diverts almost exclusively the integration of immigrant students to public schools.

The implications of the increasing segregation between private (concertada) and public schools for teachers working conditions surfaces regularly in the educational discourse as simple fact. In recent surveys undertaken by the three trade unions representing teachers, all voice their concern that schools funded with public money have to equally participate in the schooling of more “problematic” students (Aguirre Gomez, 2005). The fact that the percentage of immigrant students has doubled from 2000 to 2002 converts this into a prime focus of attention for changed working conditions of teachers. However, since privatisation is not a general theme but rather meshed into the public funding of the “normal” school system in Spain, there is no explicit nor systematic attention paid to these circumstances in research, as the following overview of some recent investigations demonstrates.

To start out with the most interesting investigation, Jesús Domingo Segovia (2000) has studied the situation and training needs of teachers which work in disadvantaged neighborhoods. The approach of his team combines qualitative (7 biographical case studies, interviews) and quantitative analysis (1200 questionnaires) of primary and secondary teachers and underlines the above mentioned differences between public and private teachers. In general, teachers

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43 The Real Decreto 366/97 establishes the free choice of the school. See also Viñao Frago 2001:68
44 It should be noted that the market principle of competition is not only one among other means to improve quality of education, but counts as the only means for conservative authors such as Schwartz (1997) and López Rupérez (1995).
45 88% of immigrant students go to public schools. Overall, as already mentioned, the social classes are not equally represented between the private (concertada) and public schools. Pedró 2004:210; Defensor del Pueblo 2003.
46 Under the topic “Equality of Opportunities in Education” the Spanish Ministry of Education has financed from 1990 to 2001 55 investigations (including special needs education) where the peak clearly is in the early nineties with an average of six investigations from 1990 to 1995. Newer data from 2001 onwards is not available. Investigations which implicitly are related to themes of privatisation in education deal usually with emerging necessities for teacher training programs and “job satisfaction”.
that work in those areas of economic difficulties, ethnic minorities, or cultural isolation, all report their lack of adequate training, where preference is clearly on workshops or meetings that allow for exchange of opinions and experiences. The report also indicates that those counseling sessions are most effective when supported by university experts and count on institutional support (of the school).

A second investigation which relates loosely to the working conditions of teachers is by José Luis Álvarez Castillo (2000). His quantitative research compares and measures the efficiency of a specific teacher training program to prevent and combat stereotypes for teachers dealing with inter-cultural issues. The research is focused primarily on cognitive efficiency of teachers and does not take into account the wider socio-economic or sociological factors as the separation between public/private institutes would suppose.

The quantitative investigation by Fernández Fernández (2000) evaluates a special pedagogical program (Pedagogía Adaptiva) for improving the way in which schools approach the necessities of their weakest students. Although the study reinvigorates the importance of teachers as learning guide and for maintaining a favorable learning atmosphere in class it does not reflect on the wider socio-economic context in which teachers are operating. On the contrary, it focuses on the improved ability of teachers to better judge the learning capacity of their students as a preceding step to prepare better and more diverse didactic units. The improved learning experience of students then is related to school improvement.

A more recent study (2001) by Vicente Garrido Genovés distinguishes itself from the previous studies in that it takes up an explicit sociological perspective. It works with prevention strategies for reducing risks of school drop-outs by countering the segregation tendencies on the social and personal level in class rooms. It aims at improving the social and negotiation skills of students. Although the study takes into account the wider socio-economic environment of students with a violent history, including their families, the special role for - and of teachers in this process is not explicitly analysed.

In summarising, it appears that the distinction between public and private schools in Spain does not enjoy a special analytical importance. Although some investigations could be said to deal with the segregating effects of public and private (concertada) schools and teachers working conditions, these studies are clearly a minority.

Professional Knowledge
There is not a common Spanish national definition of “professional knowledge”. However, through research’s documents, programmatic proposals and official documents, at least, the following representation emerges:

Teachers are thought as professionals who should be able to:

1. Be knowledgeable on the curriculum subjects’ content and skilful on their teaching.
2. Be expert on the assessment of pupils and students’ learning and on their own process of teaching.
3. Be experienced on pupils’ counselling on their learning processes in
4. Be able to give advice on educational and professional investment in collaboration with the school departments in charge of these issues.

5. Pay attention to affective, social and moral development of pupils.

6. Develop managerial skills to promote complementary learning experiences.

7. Develop personal and social skills to contribute to the development of a school climate based on respect, tolerance, participation and freedom in order to promote democratic citizenships values.

8. Develop teaching, managerial and leadership attitudes.

9. Participate actively in all school’s activities and actions.

10. Participate in the evaluation and assessment actions promoted by the Administration.

11. Do educational research and develop innovations on teaching and learning processes.

12. Develop all these professional competences through team working.\footnote{These characteristics have been adapted from the LOE (2005) specifications.}

A key issue in Spain concerning professional knowledge of teachers is the insufficient and inadequate initial educational training and instructional character of much in-service training. The principal problem repeated by the introduction of the LGE and later on by the LOGSE is the same: to attend a more diverse population of students including increasingly immigrants and to prepare them for a rapidly changing information society which requires higher skills than memorizing decontextualized, disciplinary facts. The principal problem voiced in different teacher surveys but also throughout the investigation is that teacher training has largely remained unchanged. As surveys of teachers’ opinion indicate, many think that they were taught to transmit information and test students rather than to stimulate and orient them towards becoming self-reflective and autonomous learners (Pérez Gómez 2004:136).

The problem is rooted already in how initial teacher training is organised. In the LGE, both primary and secondary training is a university level program. However, pre-primary education and primary education up the age of 11 years only requires the completion of a three year program after which teachers acquire the title of \textit{Maestro} and a Diploma. Although primary teacher training was reformulated with the LOGSE in 1990, this related primarily to reorganisation of content then of length of this career.

The career of secondary teachers is still organised according to academic disciplines in which students receive only towards the end of their studies special pedagogical training. What is lacking is precisely a strong pedagogical component in this initial training which would make available more strategies for teachers to deal with the diverse and complex situation in society and their class-rooms.\footnote{See Esteve 2000:23, Marcelo 1995, Pérez Gómez 2004:138-9} Many of the investigations listed try to compensate this lack of
adequate initial training through strong programs of in-service training varying their emphasis. Rivas Flores (1998) draws the attention to the link between daily teaching practice and professional culture; Alonso Tapia (2000) provides alternative formats of student evaluation which part from memory-tests; Soutu González (1998) again links professional development to research activities; and Vicente Rodríguez (1998) understands professional development of teachers as a process of personal change and growth.

Although there existed as indicated a strong alternative pedagogical movement during the mid 1980’s which was marked by experimentation and bottom-up process of educational change closely tied to teaching practice, this spirit of self-directed innovation through and by teachers did not survive the major educational reform (LOGSE). In-service teacher training has been converted in a matter of acquiring new technical or administrative skills which seldom address teachers’ culture, collaboration between teachers, or a reflective practice. Teaching practice fails to become a source of knowledge for educational change all the more with the most recent education reform, the LOCE stressing personal effort, efficiency and quality.

**De-Professionalisation**

If by professionalisation we understand the degree of control and autonomy an occupational group exerts over its conditions of professional training, certification of professional competence, conditions of work, the market of services and the groups relation to the State, one has to speak of certain de-professionalisation in the Spanish case.

One exemplary case is the control and participation of the curriculum design as it changed from the period of educational experimentation in the 80s and the actual implementation in the education reform LOGSE in 1990. Teachers understood themselves as agents of the social change towards a democratic and plural society. The initial plans of the educational reform were aimed at achieving an open curriculum in whose design teachers could participate. However, in the final reform, the Ministry of Education specified the minimum contents for the curriculum for all Spanish schools (*Diseño Curricular Base*) which had an exclusive orientation towards a psychological understanding of knowledge and a constructivist learning perspective. Through this imposture and ambiguity of a prescriptive base curriculum, many teachers lost their role of active participants in matters of educational content but rather had to assure the dissemination and application of the “official” version. The role and thus the professional knowledge of teachers got redefined from contributing to the curriculum in a substantive manner to a more passive role acquiring first of all the approach and methodology implied in the official curriculum.

This turn towards a passive, receptive position of teachers in matters of curriculum design where the base curriculum was imposed by the State – and the Autonomous governments - has to be understood as a de-professionalisation equally effecting in a second step in-service teacher training. The *Centros de*

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49 Rodríguez 2001a: 64ff The author also indicates that the official State version of the curriculum was developed from a rather theoretical perspective, leaving aside the practical experiences and knowledge gained by teachers in their daily work.

50 Ibid.:172-173;
Profesores (CEP) – the principal institution for in-service teacher training – adapted its program according to the necessities the dissemination of the base curriculum implied. It focused primarily on imparting psychology oriented pedagogies and the instructional definition of contents under the ‘elaboration theory’\(^{51}\) on which the State curriculum was based. In combination with the salary promotion of teachers which is coupled to in-service training, most teachers were thus “obliged” to learn those contents. Equally, in-service training which consisted in counselling inside schools and in which the CEP would follow a training request formulated by teachers shared the same technocratic fate. Initiated with the idea to provide a space for reflection for teachers it was mainly used as facilitating the elaboration of schools curriculum as a derivation of the official version. Since each school had to present its own curriculum plan conforming to the minimum requirements of the established official framework, CEP counseling was mainly used for streamlining schools and State vision.\(^{52}\)

The relation between teachers and the State in times of education reform is another interesting point in case. The difference concerns mainly the change of Government. Whereas the period of the education reform of the PSOE which lead up the approval of the LOGSE was marked by a high of implication of teachers in elaborating alternative, democratic models of education (the experimental phase), the subsequent major reform undertaken by the PP in its second legislation from 2000 onwards did not count on a systematic and plural discussion between teachers representations and the State – although the official rhetoric claimed to act in the interest of teachers.\(^{53}\) Currently, with the new education reform undertaken by the PSOE, a more collaborative approach has been applied, where the Ministry of Education has initiated a process of debate with the educational community, including teachers’ unions.

A rather “tricky” dimension of de-professionalisation of teachers in the Spanish case is the forms of administration and government of education centers. With the LODE and LOPEG a “strong” democratic approach was implemented, in which the School Council was the main decision making organ in which all members of the school community where represented (headteacher, head of studies, parents, students, teachers, administration). Although the real decision making power of the School's Council is quite formal, the mere fact that parents thus have a voice in matters which concern professional educational concerns has been perceived as an intrusion of teacher professional competence.\(^{54}\)

Following this line of de-professionalisation, the LOCE furthermore has undermined the competence of teachers to govern their own workplace. This has not happened through a change of the rights and obligations directly ascribed to teachers, but rather through a renewed authority of the headmaster.

\(^{51}\)See Reigeluh, 1979, Reigheluht and Merril, 1980.
\(^{52}\)Ibid.:67-68; Morgenstern Pitcovsky (1993b) also describes the staff of the CEP's as having little practical connection with movements of educational innovation and as being perceived by teachers as “imposed by the administration” to promote educational reform.
\(^{53}\)Jiménez 2002 details that no “White book” was published by the Government giving a sort of snapshot of the current state of affairs in the education system; neither was there any empirical based justification of the necessity of the reform. The same lack of cooperation was repeated with the LOCE on the level of State and Autonomous Communities. See point 3.2.1 above.
\(^{54}\)Arenas Vázquez 2001:.86
Competencies formerly assigned to the School Council which counted on a representative of the teachers body now is centered in the headmaster.

Furthermore, with the approval of the LOCE in 2002 it is worth mentioning the introduction of a discourse on quality control, individual effort and efficiency of education. Especially the evaluation of the education system and of course teachers are paramount in this context. Decisive is the fact, that the Ministry of Education has established a system of indicators which provide the base of this evaluation. Being submitted to this processes and dimensions of external evaluation the autonomy of teachers to address the idiosyncrasies of each individual collective of learners is seriously questioned. Besides, it is evident that teachers themselves have no possibility of influencing or controlling those indicators which are decided centrally by the Government (Torres Santomé 2003:80).

**Professional Identity**

Martínez Bonafé (2004) distinguishes two dimensions of professional identity for teachers: on the one hand macro-structural indicators as age, class, gender, in short the demographic and descriptors of the profession (as contained in this report). These sociological descriptors are distinguished from the professional identity in the strict sense which refers to the self-understanding of teachers, their role and responsibility in society, the “nature” of their work, etc.

In the latter case, professional identity in Spain is marked by a certain isolation of the teacher from the wider society and its fast changes being closed in to the classroom. Whereas society changes at an ever increasing speed and increasing numbers of the working population have to face the insecurities and scarcity of jobs, teachers “enjoy” a certain isolated status in being state employed (life-time). But this isolation from the insecurities also implies that his/her identity is defined by a more or less closed biography of classroom practice. The principal place of work is the aula.

Secondly, the professional identity is heavily influenced by the failure of teachers to provide students with future-oriented perspectives. The perception pertains, that what you learn in schools is outdated the moment you leave school; the old function of preparing students for a work place and channeling pupils into guaranteed predefined societal niches has broken down leading to a crisis of the traditional function of the teacher. Given the fact that disciplinary knowledge continues its stronghold on professional identity in combination with a de-evaluation of factual knowledge itself deepens the crisis.

In the same direction Arenas Vázquez (2001) argues that the professional identity of teachers has been severely damaged by the various educational reforms since they were implemented without considering the professional culture of teachers thereby erasing their practice and signs of identity and cohesion as a group. It is a loss (de-professionalisation) in terms of competence, vocation, access to the profession, independence and autonomy in the execution of their work from the State and the users (students, parents). In that changes affect and question their competence, de-evaluate their (disciplinary) knowledge or their vocation, Arenas speaks as well of a crisis of the profession.
Nurses Research Review

Historical background

The development of the Spanish health care system cannot be understood without considering the long period of Franco’s dictatorship (1939-1975). The immediate precedents of its actual shape are therefore to be found in actions taken under an authoritative regime, an important particularity. During that period, the dominant Keynesian model of welfare state governing in other European countries did not develop in Spain. During the 1940s and 1950’s health care remained largely marginal in terms of population coverage and extent of benefits. In 1942 the public insurance system covered only 20% of the population, in 1950 30% and in 1960 45% (EOHCS, 2000: 10). It was not until 1967, after a decade of steady economic development, that the Basic Social Security Act was sanctioned. It allowed expansion of coverage to self-employed professionals and qualified civil servants and it helped the creation of a network of somehow modern public owned hospitals. As a result, the percentage of population covered rose from 53% in 1966 to 81% in 1978. According to the European Observatory on Health Care Systems, the “predominance of public provision within a social security system… can be considered the main distinctive feature of the Spanish health care sector as it emerged from the Franco period. Consistent with this, the vast majority of primary health care provision is public, with general practitioners having the status of civil servants” (Arenas Vazquez:10).

Public modern hospitals were in fact the main priority during these years, leading to an underdevelopment of primary health care. Its fragmentation and weak regulation resulted in several not coordinated subsystems (ambulatorios, consultorios – primary health centers and first aid units-). Physicians accumulated a historically important degree of power in both sides of this dual setting: big modern hospitals and decentralised primary health care clinics. Members of the Corporative Medical Organisation (Organización Médica Colegial), their political instrument, occupied the majority of top managerial posts.

In spite of the growth of coverage, the goal of a universal coverage was not part of the political rhetoric well until the 1978 Constitution (Freire, 2003). That was precisely the main concern of the transitional period, together with an organised decentralisation of the health care system. The legacy of the Franco period can be summarised in three main points: coverage was not universal, coordination between the different networks was poor, and primary health care was clearly underdeveloped. In EOHCS’s words (2000: 111), “the administrative structure was extraordinarily fragmented and chaotic, due to the lack of any rational restructuring of the many: overlapping networks inherited from the past. At central level, 53 ministerial departments held health care responsibilities”. First attempts to a comprehensive reform during the period 1976-1982 failed due to the lack of support and the absence of a global model. It was a period of limited change, hospitals monopolising the budget and primary health care left aside (ibid.).
When the socialist party won the 1982 election, its wide majority allowed it to carry out such a reform for the first time. The transition to a National Health Service model based on universal access, tax-based financing and predominant public provision resulted in the General Health Care Act of 1986. It consolidated and integrated most of the partial reforms made since 1977, including the decentralisation process. In short, it formalises those rights present in the Constitution and consolidates the transition from a social security system (dated from 1963) to a national health service. However, it should be pointed that regardless of its principles of universal, free and egalitarian access, the General Health Care Act allows certain groups to maintain their specific sanitary coverage. Civil servants, for example, have the possibility to chose between public and private systems, and more than 85% prefer the former, preventing the public system from having a very important group of users and helping to maintain a social gap (Freire, 2003: 306; Comisión de Servicios Públicos del Foro Social de Zaragoza, 2004).

Until 1991 expenditure growth was rapid and the network experienced considerable development. But the restrictions imposed by the Maastrich Treaty and the general economic crisis led the government to introduce in 1991 the Convergence Program (Programa de Convergencia) the first of many proposals for expenditure control (EOHCS, 2000: 113). During the 1990’s and after, the main concern has been efficiency and efficacy. This has led in turn to the rehearsal of various management models and the aperture for collaboration with the private sector. We should note again that since every region is responsible for its health care system, a great degree of variation exists among them.

Recent data collected by the OCDE (2004) shows that total expenditure on health care accounted for 5.3 % of the GDP in 2000, European average being 7.2%. Spain is one of the countries among the European Union with less relative public health care expenditure. While from 1987 to 1993 expenditure grew reaching an historical high of 5.8% of the GPD, it started to decrease until 2000. The latest data available shows a very slight increase (5.4% of GPD in 2001 and 2002). In the same period, the private expenditure has increased too, from 2% of GPD in 2000 to 2.2% in 2002. The total health expenditure reached 7.6% of GPD in 2002.

We will now tackle in more depth two periods of deep reform, trying to relate it to its impacts in nurses’ lives and knowledge. It should be said, though, that this line of research has not been developed in Spain. Therefore, the relation of the structural changes with its impact in workers has to be traced in a provisional fashion. We were not able to find consistent research in this field, or focused this way. We will nonetheless point those structural changes that we think have been important in the restructuring of the profession and relate it to the occasional data we have found in this respect. This lack of research should not surprise us, for it has been denounced by sociologists in the field as soon as 1979 and ever since (de Miguel, 1979; Irigoyen, 1996; Freire, 2003). In fact, the national health system has been called an “invisible institution” (de Miguel, 1979) or an “opaque institution” (Irigoyen, 1996) for those engaged in its study.

Decentralisation in the Spanish context specifically means the redistribution of competences from the Central Government to Regional Governments (Comunidades Autónomas). Rico (1997) considers decentralisation a very important characteristic of the Spanish System.
Irigoyen goes further as points at the hegemony of traditional disciplines associated with Public Health in the study of the field as one important factor, limiting other disciplines as sociology, more concern with the collection and analysis of data, and associated historically with “critical” points of views. The European Observatory on Public Health Systems, in their 2000 report, goes as far as to signal the information development as the most urgent present challenge for the Spanish system. As they say: “…probably the most important deficiency in the Spanish health care sector at the turn of the century is the weaknesses of information gathering… Critical information, such as staff and utilization levels in primary care, size of patients lists, patterns of utilization by age and social class, coverage of the new primary care network, waiting times, or the cost profiles of each hospital, is not generally available in Spain on a nation-wide basis while, until December 1999, the same was true for total public expenditure.” (EOHCS, 2000: 126-127).

**Demographic Trends**

There are three staff categories in Spanish Health Care System (EOHAC, 2000: 87):

- University-qualified health care personnel: physicians, dentists, pharmacists, biologists, chemists and clinical psychologists.
- Intermediate graduate health care personnel: social workers, qualified nursing staff, midwives, physiotherapists, occupational therapists, specialist technicians, hygienists, dental nurses, and auxiliary nursing staff.
- Other personnel: technical, special service, maintenance, and other staff.

One of the characteristics of the Spanish system is that the majority of medical staff have a status alike to that of civil servants. “Negotiation of working conditions is done centrally, while health center managers have limited capacity to negotiate salary incentives” (EOHCS, 2002: 6). It is also remarkable that the relative number of doctors is the second highest in Europe after Italy (4.5 for 1000 inhabitants), while the relative number of nurses is the forth lowest (5.2 for 1000) (INE, 2004). This lack of compensation is related to the ‘overproduction’ of doctors during a long period (Departament de Sanitat, 2003; EOHCS, 2002). Data, however, should be considered with caution, since statistics are elaborated by the professional colleges and do not distinguish between active and non-active professionals. In fact, data varies depending on the institution that collects it; according to the OCDE (2004), there are around 3 active physicians per 1000 inhabitants. Growth of staff has been steady in the last 20 years, especially doctors and nurses. Nurses have increased by almost 25% during the period 1988-2002 (circa 170,000 to 210,000). Doctors, in the same period, have increased in a similar percentage (circa 140,000 to 185,000). Data shows a wide “feminisation” of nursing: 82% of nurses are women. The professional profile is also young: 27% under 35 years old and 45% under 44 years old. By contrast, 60% of physicians are men and 60% of total are between 35 and 54 years old (INE, 2004).
Within hospitals, data from year 2000 (INE, 2004) shows that doctors make up 14% of staff; nurses 28%, technical sanitary staff 27%, non sanitary staff 30% and other 1%.

One of the very few quantitative sociological studies of the nursing profession has very recently been published (COIB, 2005). It was ordered from the Nurses Association (COIB, Collegi Oficial d’Infermeria de Barcelona) to the Department of Sociology of the University of Barcelona. Even if related exclusively to the province of Barcelona, it is interesting to mention some of the results, since it is by far the most comprehensive and recent study carried on (2,218 questionnaires for a population of 27,251 nurses):

- Nurses are a clearly feminised group (87% and growing) and relatively young (average age of 38, the most numerous group being 25 to 30 years old)
- They define themselves mainly as middle-class
- 60% of nurses earn between 1,200 and 1,800 €. An important 28% earns less than 1,200 €
- Almost 50% of nurses have a steady contract, with only 20% being under the statuesque personnel and another 20% being on a temporary contract
- The average of working hours per week is roughly 38 (the average desired working hours per week being 33.5)

Thematic analysis of literature

1980’s - first reform and decentralisation

During the 1980’s there were two fundamental processes of reform going on. It is key for understanding the Spanish health system to study them. First, the decentralisation process. Second, the comprehensive reorganisation of primary health care. With respect to the former, beginning in the early 80s every public health center was integrated into a single network within each region, even though the process took place at a different pace in each region (EOHCS, 2000: 14). The first Autonomous Community to gain control over its public health system was Catalonia, in 1981. Andalusia followed in 1984, the Basque Country and Valencia in 1988, Navarra and Galicia in 1991 and the Canary Islands in 1994. The rest of regions remained under the control of the state’s general administration until 2002 (Freire, 2003: 302). This gradual process and the lack of a proper information system make it especially difficult to speak of a unitary Spanish health care system or to compare between the different regions (the process of reform of primacy health care we are about to study, nonetheless, is considered to be the general frame and therefore applicable to a certain degree to all regional systems (ibid.)).

The radical reform of Primary Health Care was the second cornerstone of 1980’s reform. It was intended to substitute the old ambulatory system with modern medical centers with specialists in family and community health. Some of the more important changes were:

- Physicians employed full time (7 hours a day instead of 2 and a half)
- Organisation in ‘work teams’ (Equipos de Atención Primaria)
that grouped together doctors, nurses, social workers and auxiliary stuff.

- Building of a network of Health Care Centers (Centros de Salud)
- Doctors paid by salary instead of ‘cartilla’ (health card)

It should be noted, though, than this process has not been equally implemented in every region. According to the Ministry of Health, the new system covered a third of the population in 1987, 63% in 1993 and 90% in 2000; but in regions like Galicia or Catalonia, it still only covers about half of the population (Freire, 2003: 320). These extreme differences should prevent us from easy generalisations. The extraordinary slowness of change, still uncompleted more than 20 years after, has frequently been criticised too (ibid.).

Two of the aforementioned questions require special attention. The notion of ‘work team’ is extremely important because it re-situates the hegemony of doctors in the health care field. Its non-hierarchical structure and the idea of integrating all professionals into a single unit have brought intense resistance from doctors. The emphasis on health promotion more than on illness cure is also an important break with the model inherited from the Franco period. Irigoyen (1996) has studied precisely the process of reform and its resistance from within, concluding that doctors had the power to block it leading to a situation of extreme crisis and to a second reform. But let’s get into detail.

The sanitary system developed during the Franco period is defined by Irigoyen (1996) as “self-determined”, that is to say self-regulated. The chaotic organisational diagram of this period resulted in doctors occupying a hegemonic position with a wide margin of action and decision-making. First attempts to reform are seen, therefore, as intrusive. External critique and diagnosis is not shared by actors, especially doctors. But they did not oppose either, they behaved like Baudrillard’s ‘silent majority’: “one of the most subtle ways of resisting to change is then mobilised, consisting in refusing to recognize any problem” (ibid.: 18). The process of reform started more intensively after 1982’s Socialist Party majority in the Parliament. Inspired by WHO’s principles, the reform tries to limit doctor’s power, introducing a complete new organisational design with important aspects such as ‘work teams’ and new management positions. The reform was designed and implemented with a classical top-down strategy. It followed a typically leftist model of global and uncompromising change. However, its lack of internal support could paralyze it. As Michel Crozier acknowledges (1984: 14-15), top-down, legislative change with no internal support is condemned to failure. Institutions change from inside or do not change. Imposing change against its actors can only result in resistance and/or blocking of it. The growth of management posts, for example, did not result in any significant change, their political functions being constantly blocked since doctors never recognized them as legitimate actors: managers’ economic and entrepreneurial rationality was never respected by doctor’s clinical rationality. Even from the doctors’ perspective, it is acknowledged the necessity of using ‘informal power’ to carry on changes (González-Busto, 1998), since it is in everyday practice where changes are to be made. For those physicians concerned with reform, it was also essential to articulate solid
‘group’s interests’ which would facilitate dialogue and increase capacity of negotiation (ibid.).

According to Irigoyen (1996), the bureaucratic model developed during the Franco years was based in a simple hierarchy that gave power to doctors. This was to be substituted by a technocratic model with the reform, “a system of management based in a technical understanding of reality, that conceives organisations like systems configured and orientated by principles and objectives of technical rationality” (1996: 32). The technocratic logic could never erase completely the bureaucratic one, and the coexistence of these two divergent logics, together with the rise of new management posts, leads to a situation of deep crisis. As we have already said, doctors were especially sensitive to the reform, which they saw as a threat to their position. Nurses, therefore, were placed in a delicate position: the new organisational design gave them expectations to better their position while at the same time were seen by doctors as part of the alliance to take their power.

The first reform implies a process of power redistribution at two levels: within the organisation, the new management posts take power from doctors, and nurses and other lower positions better their position around the notion of teamwork. Secondly, the transition from an assistance-oriented model to a primary care one implies once again the reduction of doctors’ biomedical discourse relevance. Health promotion will replace cure as the leading rationality. The main objective is not individual illness treatment anymore; it is the improvement of collective health. This explains the key importance of the new Primacy Health Care System in relation to the hospitals’ network, clearly orientated to illness eradication. The change from a curative system to a preventive one also means that health is no longer doctor’s business; it concerns a wide and heterogeneous array of professionals.

Changes in organisation and rationality do not necessary imply changes in everyday practices, though. The new directives could easily ‘take’ the bureaucratic structure, but could hardly have any impact on actual assistance, totally controlled by doctors. The reform of the organisation is constantly defied in everyday practice (Irigoyen, 1996). The new model is ‘filtered’ through practice, adapted in such a way that does not threat the dominant informal organisation. The new logic is therefore ‘superimposed’ to the old system. Doctors do not discuss or oppose the reform. They comply with it and transform it in everyday practice. They ‘adapt’ the reform. They retain their power while at the same time new directives posts proliferate.

**1990’s - reform and flexibilization**

The second reform is related to two processes: the collapse of the first reform and the general trends in health care in Europe. In 1990 the Government asked for a report of the Health System situation. The commission in charge admitted the failure of the first reform and suggested a complete change of the system. Known as *Informe Abril* (*Abril’s Report*), the report is signed by the Commission of Analysis and Evaluation of National Health Care System (CAESNS, 1991). The split between the 1980’s Spanish reform and the general trend towards management is there recognised as a problem to be solved. Therefore, ‘synchronization’ with general trends is one of the objectives. The
The general design of the reform relies on ‘excellence’, ‘costs-control’, ‘management strategies’ and ‘adjustment to users’ expectations (Irigoyen, 1996). The planned reform opens the way for ‘collaboration’ with the private sector (sub-contracting) and introduces the idea of competition between services’ suppliers to raise quality, scope, and price of provisions. Its main features are therefore: flexibility, decentralisation and internal competition.

The Informe Abril, (CAESNS, 1991) proposed the split between functions of financing, buying and service provision. This was meant to make the system more flexible, or in other words to allow a certain degree of private management of the public health system. The original suggestion was in fact to make public health centre enter the Private Right Regime, like any other enterprise, through the concept of ‘foundation’. The report had great opposition so the actual reform was much less radical. Nonetheless, the decentralisation of the system allowed some important variations. In Catalonia and the Basque Country these ideas were turned into practice. The 1990 Catalan Health Care Act, for example, “opened the way for the introduction of new flexible forms of organisation and management of health centres, explicitly including for the first time the possibility of contracting out the management of publicly-owned health centres to the private sector or to public providers opting out of the public system” (EOHCS, 2000: 114). With the right party (Popular Party, PP) winning the general election in 1996 the spirit of the Informe Abril was promptly rescued: the 10/1996 Royal Decree on new forms of organisation and management; the Report of the sub-commission of Health of 1997 (15/1997 Act) and the strategic plan of the National Health Institute (INSALUD) of 1998 clearly plead for gradual privatisation.

Cuervo (1996) alleges that the reform was necessary since the bureaucratic model was incapable of facing new social demands (mainly quality, capacity of choice and personalization of service). He also defends the necessity of internal competition for the system to change and to better its service. Rigidity is stopping the system from responding to its social environment. Elola (1996) explains the crisis in a slightly different manner. It would have to do with the increase of the cost of the system (related to ageing of population, demographic growth, technological investments, and inflation among others), the decrease of social legitimacy (users’ increasing dissatisfaction), and decrease of efficiency (lack of capacity for adaptation to new necessities and technologies). The crisis of the health care system is closely connected with the crisis of the welfare state that sustains it. What is necessary, then, is to rethink the two of them under the light of present time.

The new management model, the ‘only possible’ response to the crisis, has to be understood within early nineties’ “management explosion” in the public health sector (Irigoyen, 1996). The hegemony of ‘health economy’ and ‘management sciences’ partly explain the conceptualization of the second reform. Management is seen as the only way to keep up with social changes and ‘mobilize’ labor force around individual merit, mobility, communication, motivation, autonomy, quality, ‘the project’, etc. (Aubert and de Gaulejac, 1993: 25-38). The Thatcher reform in English National Health System is the referent.
The politics of public deficit control has led to an important diminution of public investment in health. New ways of privatisation have been rehearsed: private insurance promotion and the creation of entrepreneurial-like public sanitary foundations are two of these mechanisms. The Social Forum of Zaragoza, a critical collective that has been studying recent trends in welfare state in Spain (Comisión de Servicios Públicos del Foro Social de Zaragoza, 2004) has concluded that there is a real risk of social fracture: promoting the private health system can lead to a public health system “for the poor”. They give some interesting data in this respect. Starting in 1993, public budgets (Presupuestos Generales del Estado) have decreased relatively health expenditure. The crisis of 92-93 first and the Maastricht Convergence Plan after generated an “economical austerity” in order to attain budget equilibrium. It is estimated that in 1993 70% of health expenditure (medicines included) was public. That percentage has been decreasing slightly ever since. Private health even has fiscal benefits (40/1998 Act).

This reform differs with the first in more than its rhetoric. Its key mechanism is “to propitiate changes in the system that induces actors to change their behaviors” (Irigoyen, 1996: 85). That is to say, it does not aspire to change actors’ mental structures, but to cause those changes by changing the dynamic of the organisation and offering rewards for those who collaborate. It changes a top-down model for an ‘adhesion with the project’ model. The implementation of the model, of course, is never to be fully accomplished. Especially with a model that once again refuses to acknowledge actors’ different logics and internal power relations. The split between the ‘rationality of change’ and actors’ ‘vital worlds’ remains untouched. The micro level of everyday practice, where ‘sense’ is produced by actors, is radically detached from changes in regulations (ibid.).

If 1980’s reform was focused on extending and rationalising the public system as well as improving coverage and access, beginning in the early 1990’s the targets were increasingly control of rising costs and improvement of levels of public satisfaction (EOHCS, 2000: 113). In spite of a considerably high social pressure against market-oriented policies, some important proposals were passed. They are worth mentioning: “changes in the organisation and management of hospitals; experimentation with contracts and prospective payment systems; the launching of several measures to contain pharmaceutical costs; and small steps towards increasing the role of private management and ownership within the public health care sector.” (ibid.: 114)

As one of the most ‘advanced’ regions in the public-private collaboration, it might useful to summarise the situation of the Catalan Health Care sector. The “crucial paradox” of the implementation of the first reform (Rico, 1997: 124) was that the model it was based on (the British NHS) was already being thrown into question there. As the new ideas of managed competence were introduced in Britain, decentralisation allowed Catalonia to take a leading role in following them. The Parliament passed the Catalan Law of Health Care Reform (Llei d’Ordenació Sanitària de Catalunya) “only a month after a similar reform, the quasi-market reforms, began to be applied in the British NHS” (ibid.: 124). The law included the division of financing and purchasing functions from the provision of services, shared by private and public hospitals and primary health
The reform also involved some operational measures such as the regulation by private law of the top public institutions responsible for policy formation and direction; the decentralisation of planning and priority setting to the local level and health care centres; and the introduction of a public/private mix in the management of health care centres, although public control in such managerial joint-ventures was guaranteed” (ibid.: 124-125)

According to Navarro (2003), health expenditure decreased in Catalonia from 5.6 of GPD in 1993 to a 4.9% in 1999. This percentage is considerable lower than the UE-15 average (7.1%) and the Spanish average (5.7%). This means that Catalonia is one of the European regions with the lowest health expenditure. At the same time, pharmaceutical expenditure is extremely high (20%), resulting in a total non-pharmaceutical health expenditure of 3.92% of GPD, the lowest in Europe. Besides these general data, reforms have not been able to reduce waiting lists, to increase visits’ time, or to actually implement the primary health care reform: more than 20 years after it was sanctioned, between 30% and 50% of population continues to be attended in old ambulatories 56.

Recent times

Recent times have been quite active in legal developments. We have seen legislation on patient rights, personnel management and system’s quality passed. The 16/2003 Act of Cohesion and Quality of the National Health System (Ley 16/2003, de 28 de mayo, de cohesion y calidad del Sistema Nacional de Salud) is extremely important, since it is one of the more comprehensive reforms of the system carried since its foundation in 1986. It starts by acknowledging “deep changes” in society (cultural, technological, socioeconomical, ways of life and illness…) and therefore new challenges for the National Health System like orientation to results, empowerment of users, professional involvement, and integration of sanitary and socio-sanitary attention. Equity, quality and citizenship participation are seen as the keys for such a change. The first is related with the need for mechanisms which assure equal access in a decentralised scenario. The second is defined around innovation, effectiveness, and anticipation. Finally, the third is related to promoting users’ self-autonomy, knowledges, and experiences.

However, the novelty of these changes means that research on them has not yet been produced.

Incidence of reforms on nurses

Domínguez-Alcon, Rodríguez and de Miguel (1983) define the situation of nursing in Spain as “subordination to and dependency on” doctors. They see it as a historical product fed by an ideological apparatus: nursing as a prolongation of the religious and maternal care for the other/the child. This leads in turn to a reproduction of a sexist social structure, since nurses (women) should obey doctors (men). This is echoed in Medina (1999), who tries to re-conceptualise nursing from a feminist point of view. That is, showing the hegemony of patriarchal values in the constitution of traditional nursing in terms of maternal and familiar roles and modern nursing as a subordinated and non scientific activity and trying to elaborate a position for the emancipation of nursing from

56 Data varies according to Freire (2003) or Navarro (2003).
the doctors’ yoke. He conceptualises what he calls “nurses’ professional culture” as the product of both formal training and everyday conventions. This culture, he argues, provides a system of meanings which rule nursing work. Medina highlights the importance of implicit, everyday conventions and practices in configuring the subordination to the medical profession. It is especially important the systematic denial of nurses’ knowledge and the rendering of their work as merely “practical”; they are not considered experts in any way. Therefore, nursery can only be understood in relation with its marginal history within the Spanish health care system. More importantly, the processes of reform that operate at the legal level can hardly affect this professional culture, reproduced and sustained in everyday practice and socialisation. He concludes that “power relations between Medicine and Nursing have naturalised socially constructed forms of oppression” (1999:131) and have obliged the latter to “internalise a subordinate status” in respect to the former (1999: 141).

Medina’s view is corroborated by Cristina Francisco. In her Memories of a Nurse, she says that the relation between doctors and nurses is “first mediated by gender relations and then by their different role in the health system” (2003: 72). All through her book she describes the relation doctors-nurses as one inflected by paternalism. Especially in hospitals, nurses’ knowledge is frequently not valued or even disdained, the rule being precisely total subordination to medical practice and discourse.

Ortega and Sánchez (1996) give an interesting summary of the impact of the first reform in nursing. The substitution of the hospital-centered model by the primary care one led to three important changes for nurses:

- In respect to their definition: nurses are no longer defined by their place of work ‘rural nurse’, ‘ambulatory nurse’) but by their activity, the promotion of health care and the treatment of patients.
- In respect to their attitude and behavior towards patients: the reform conceives nurses as “health resources for the population”. Their subordination to doctors is contested and their autonomy and creativity is fostered. The notion of team-work resituated nurses in a less dependent position.
- In respect to their responsibility and decision-making process: independence from other services is to be guaranteed. Decisions in nursing are to be taken by nurses. Team-work relies on the autonomy of the different areas.

This design, we already argued, facilitated a ‘coalition’ between nurses and new managers; nurses expecting a significant bettering of their position, managers looking for necessary support. Top-down reform, however, could not guarantee changes in the everyday field. Medina (1999) argued that. And according to Irigoyen (1996), the situation during the 1980’s reform confirmed Freidson’s “nursery dilemma” (1978: 79): nurses need spaces of affirmation to liberate from doctors’ subordination, but these spaces are unattainable since their practice is constantly supervised by doctors.

This seems to be the perspective of Giménez when she writes that “it is important not to forget that the implementation of a real Primary Care Network is not a question to be resolved legally; its proper development is a mid or long
term objective. “Change is gradual” (2003: 104). She goes further and introduces the ambivalent role of nurses in the reform of primary health care and the notion of team-work. The redistribution of power also implies the assumption of more responsibilities by nurses, something that not all are up to.

While it is hard to isolate the impact of the management reform of the 90s solely on nurses, since bibliography focus on organisation change and not on actors’ experiences, some aspects can be provisionally highlighted. First, the introduction of management in any organisation tries to transform its relation with workers. The meaning of work is supposed to radically change for them: it inverts the idea of ‘receiving something from the organisation’ to ‘giving everything to it’ (Aubert and de Gaulejac, 1993: 39-41). ‘Total compromise’ is expected from every worker; ‘submission’ to the organisation is radically substituted by unconditional ‘adhesion’ to the ‘project’ (ibid.). The mission of the organisation also changes. Emulating a service company: management introduces a new way of treating patients as clients. Professionals must therefore be receptive with client’s signals.

The ‘spirit’ of the managerial reform in which nurses must nowadays work is correctly captured by Irigoyen:

“Postbureaucratic paradigms are the explosion of management… Its referent is the new enterprise… Its principal elements are: short-term goals, structural flexibility, multidirectional channels of communication and action, continuous change, innovation, individualization, reduction of rigidity in norms and procedures, relation costs-results, organisational relationships understood as a network of contracts linked to goals and results, ‘meritocratic’ culture, internal competition and orientation towards clients.” (Irigoyen, 2004: 75)

These entrepreneurial concepts, though, have great implementation difficulties in such a particular environment as the public health system. Based on and built upon a bureaucratic model, the ‘mental structures’ of its members and the ‘culture’ of the organisation are not easily subsumed to a managerial model (Irigoyen, 2003). The introduction of the cost-benefit rationality and the ‘excellence’ model faces severe limitations: various resistances, general suspicion of ‘hidden objectives’ with the reform, prevalence of civil servants that greatly limits the model of easy hiring and firing of workers, etc.

Antón (1998) protests against the lack of mobilization and union in nursing. She argues that nurses suffer poor conditions of work and have not been able to unite and pressure the system. The fight for their rights, she says, is something still to begin.

According to the aforementioned COIB 2005 Report, there is a very interesting tension regarding professional practice. The report correctly affirms that the “definition of the professional role is without a doubt one the central questions regarding nursing” (COIB, 2005: 14). And while the main task and demand continues to be the solution of health problems there is a wide desire of “making the cures compatible with health consulting activities” (ibid.). The everyday practice has been subject to new important challenges (“additional efforts”, they are called) related to the social milieu of the users, like language and social
environment. The importance of in-service training is highlighted by the fact that 77% of professionals have enrolled some.

The report also deals with professionalisation and professional knowledge: “the core of every profession [is] its knowledge, and to what degree is considered, socially and organisationally, that that professional knowledge is enough for taking technical decisions in an autonomous fashion” (ibid.: 18). Professionalisation would be related also to two other processes: the capacity of the profession to apply their rationality when organizing and working, and the influence of the profession within the objectives and rationality of the organisation. The report concludes that nurses in Barcelona consider that they have a high level of control and autonomy, subject to negotiation with users in some respects. The organisation has a high level of control in managerial aspects (objectives, work teams, schedules) but very low on everyday technical decisions. The average feeling of autonomy was 6.9 in a 1 to 10 scale. Nonetheless, almost 70% felt prepared and willing to assume more responsibilities. The two challenges for the profession would be to increase their level of control over their labour and to widen their professional space. While there is a high level of satisfaction, the responses point at higher aspirations.

We should also remark that the altruist definition of the profession continues to be the more frequent (“help the others”). But, nursing is not considered a way of life nor the most important thing in their lives. It is a job, a way of making a living.

Social relations are key for nurses professional practices. There is a tight network that allows for cohesion, a permanent flux of knowledge, collaboration, and the development of a professional identity. This social network “perfectly fits nurses’ practices”. “The dominant forms of practice characterize nursing as a very specialized profession within a complex organisational system, with an important public dimension and hospital-based” (ibid.: 33).

Changes in professional training

The 1950’s

Health work occupations have been unifying through history, reorganizing and adapting to social politics and necessities of the health system. In the fifties a gradual increase in the number of hospitals takes place in Spain, characterised by the supply of advanced technological equipment, which turned them into privileged spaces for research and teaching. This fact implied in turn the demand of more, and more qualified, assistants to carry out techniques increasing in complexity. The new professional profile has to attend patients with continuity and be able to deal with challenges of new technologies, without losing traditional doctor dependency.

The clues for the emergence of these professionals are:
- The social need of a professional able to respond to the current demands of the health care system.
- The need for adaptation to the emerging model of health care system,
creating a large number of posts in order to consider current necessities.

- The trend of unification of assistant health workers

Based on these necessities, the decree of December 4 in 1953 unified the various previous degrees in a unique curriculum and qualification: technical health assistant (Asistente Técnico Sanitario, ATS). The decree unified the studies of three degrees (assistants, nurses and midwives) into one. The aforementioned rise of the demand for professionals was translated into an indiscriminate growth of the number of nursing schools, without any previous planning. Three different types of schools were established: official, belonging to churches and private entities.

These studies were carried out in a boarding school regime (only girls) from 1956 to 1972. Students had a trial period of three months after which they could be admitted or excluded. Class attendance (theoretical and practical) is compulsory. Non official schools require an exam. Basic curriculum is structured into three courses, with this distribution (Hernández Martín, 1996: 305):

<table>
<thead>
<tr>
<th>Course</th>
<th>Subjects</th>
</tr>
</thead>
</table>
| First  | Functional Anatomy  
         General Biology and Human Histology  
         Microbiology and parasitology  
         Hygiene and environmental cleaning-up  
         Notions of general Pathology |
| Second | Notions of medical pathology  
        Surgical pathology  
        Therapeutic and dietetics notions  
        Elements of general Psychology  
        History of the Profession  
        Techniques of laboratory |
| Third  | Surgical speciality (ophthalmology, otorhinolaryngology, odontology and urology)  
        Medicine and surgery of urgency  
        Epidemics and prophylaxis of transmission diseases  
        Obstetrics and gynaecology  
        Paediatrics and childcare  
        Social medicine  
        Developmental Psychology |

During this three year degree, they were also taught religion, professional ethics and politics. Medical and legal autopsy is only taught to males. Education is divided in two parts, theory (585 hours) and practice (3,456 hours) (Hernández Martín, 1996: 305):

**The 1960’s and 1970’s**

As a consequence of the increase in the number of hospitals (131 hospitals of Social Service from 1951 to 1977), an important demand of nurses was
generated (Hernández Martín, 1996: 306). The number of nurses’ schools also rose: from 23 (all feminine) in 1955 to 169 (both sexes) in 1977.

Main characteristics of these schools:
- In 1977 50% of schools belonged to INP (National Institute of Forecast) and the rest to universities, county councils, town councils or private entities
- Directors were professors or doctors in medicine
- Most of the teachers were doctors
- Nurses occupied charges such as instructors, secretaries and school heads
- Depending on the grade of influence that nurses had in management, studies acquired one orientation or another.
- Sexist differences were done in curriculum (subjects) and in fields of practice, with women being confined exclusively to hospitals
- Studying regime in quality of boarding school for women
- Overcrowding of schools that belonged to medicine Universities (1000 pupils per course), while in ascribed schools the number of pupils oscillated between 30 and 50.

Specialities were taught in official centres, although laterly some hospitals were allowed to teach some of them. The length of these studies oscillated between one and two academic courses, depending on the speciality. Specialities of ATS in chronological order of introduction are (Hernández Martín, 1996:308):

<table>
<thead>
<tr>
<th>Specialisation</th>
<th>Dates of approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obstetrics Assistance</td>
<td>18.01.1957</td>
</tr>
<tr>
<td>Physiotherapy</td>
<td>26.07.1957</td>
</tr>
<tr>
<td>Radiology and electrology</td>
<td>22.06.1961</td>
</tr>
<tr>
<td>Podology</td>
<td>29.03.1962</td>
</tr>
<tr>
<td>Pediatrics and childcare</td>
<td>22.10.1964</td>
</tr>
<tr>
<td>Neurology</td>
<td>22.10.1970</td>
</tr>
<tr>
<td>Psychiatry</td>
<td>27.10.1970</td>
</tr>
<tr>
<td>Clinic analysis</td>
<td>28.01.1971</td>
</tr>
<tr>
<td>Urology-nephrology</td>
<td>24.07.1975</td>
</tr>
</tbody>
</table>

With the General Law of education (4 of August 1970) ATS Schools were transformed into University Schools or Centres of Professional Vocational Training, a first attempt at giving a university standard to nursing studies.

The end of 70s can be characterised by a challenging situation for nurses with significant changes taking part on all levels, including teaching and medical
care. This indicates the beginning of a deep change of values, ideas, and a new philosophy… an authentic metamorphosis would come to modify their organisation charts, curriculum and methodologies of education. What's more, the transformation of nursing studies to University studies in 1977 meant, that for the first time in Spain the curriculum of Health Studies was oriented towards Health Care, now seen in a comprehensive and public service oriented perspective which included a progressive view of the health care professional which had to be trained corresponding to the future needs of the health care system. Special emphasis was paid on the career promotion and disease prevention reflected in the importance those subject matters enjoyed in the curriculum (Public Health I, Public Health II) (Serrano Parra 1991: 41). The Order of December 13 in 1978 regulated that those nurses who had taught previously could continue doing it at University. This allowed graduates to be engaged as teachers.

The 1980's

The University Reform Act of 1983 (Ley de Reforma Universitaria) consolidated once and for all nursing as a University degree. The figure of “permanent teacher” of University School was established with a University graduate degree. The conditions of approval for “permanent teachers” were specified.

The integration of nurses involved the recuperation of identity marks, including the word “nursing”. The curriculum had the following characteristics (Hernández Martín, 1996: 314):
- Length of the studies: 3 year courses
- Teaching hours: 4,600 hours divided (50% theoretical contents, 50% practical)
- Previous studies: high school diploma of vocational school training in health
- General objectives for each subject (nursing fundamentals, health-disease cycles, science of assistant nursing, where public health, biophysics and biochemistry, behavioral science and geriatric nursing)
- To establish all the subjects that are going to be taught in each course, as well as the attached area in which they belong.

Specialties of nursing degree and postgraduate training. Those nursing graduates who finished their studies in 1980 could registered to the ATS specialties thanks to a Ministerial Order of October 9 in 1980; this irregular situation of academic ordering was maintained until 1987. In 1987 a Royal Decree 992/1987 regulates this situation; establishing all specialties required to obtain the degree of specialist, and forbidding to continue teaching the specialties of ATS curriculum. The specialties established by Royal Decree (1987) are: Pediatrics nursing, Mental Health nursing, Health community nursing, Obstetrics-gynecology (midwife) nursing, Special care nursing, Geriatric nursing, and Management and administration nursing.

The objective of raising nursing studies to a university level was, among others, to decouple nursing education from hospitals, and to give health care education a more holistic perspective including physical, psychical, biological, social and
cultural necessities of the person and/or community, and finally to introduce models and theories of nursing and their development in educational contents that promote a change in ideologies and methodologies of nursing attention.

**The 1990’s**

The Royal Decree of October 26 in 1990 regulated a new nursing curriculum. The main characteristics are its organisation as a three year university degree (*diplomatura*) and its ‘credits’ composition (between 180 and 270 credits, each one equaling roughly ten hours of teaching or practice). Training is carried out in nursing university schools that could belong to university or be ascribed and depending on public or private institutions. In Spain there were a total of 105 nursing schools in 2000, most of them integrated or ascribed to public universities (Teixidor i Freixa, 2004: 118).

Another way of accessing initial nursing training runs via finished vocational studies in health studies. Persons older than 25 years of age who do not possess mentioned conditions but pass the access test to university can access to initial nursing training, as with any other studies. Each university has at its disposal a limited number of places for initial nursing training. Initial nursing training is regulated by Royal Decrees 1497/1987 and 1466/1990, promulgated by Education and Science Ministry in state-owned field, with its corresponding amendments. The curriculum must follow general addresses regulated in 1987 by the Ministry of Science and Education in Spanish territory. Some of the subjects are (Teixidor i Freixa, 2004: 120):

<table>
<thead>
<tr>
<th>OBLIGATORY SUBJECTS</th>
<th>theoretical subjects</th>
<th>practical subjects</th>
<th>Total credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration of nursing services</td>
<td>4</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Applied psycho-social sciences</td>
<td>4</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Community nursing</td>
<td>13</td>
<td>13</td>
<td>26</td>
</tr>
<tr>
<td>Geriatric nursing</td>
<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Maternal and childcare nursing</td>
<td>4</td>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>Medical and surgical nursing</td>
<td>12</td>
<td>36</td>
<td>48</td>
</tr>
<tr>
<td>Psychiatric and mental health nursing</td>
<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Structure and function of human body</td>
<td>6</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Pharmacology, dietetics and nutrition</td>
<td>6</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Grounds of nursing</td>
<td>5</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>Legislation and professional ethics</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>
The Ministry of Education establishes the proportion between theory and practice as 50%. Each University, with its corresponding university nursing school, develops their own development of the curriculum and proposes it to the University Council. This Council evaluates it in order to determine if they carry out minimum established requirements by the Ministry of Education and Science and, if it proceeds, approves it.

The obtained degree is a University Degree on Nursing (*Diplomado universitario en enfermería*). This qualification allows nurses to practice their activities in the field of health sciences at different levels and possibilities. In general terms, four basic levels are set:

- Administration of health services
- Assistance in their different levels
- Teaching
- Research

**Decade of 2000’s**

During the last years very important debates and changes have occurred in the organisation of nursing teaching. First of all, the Bologna Declaration on the European Space for Higher Education has reopened the debate on the duration and status of nursing studies. Currently a three year degree (*diplomatura*), nurses’ associations are pressing for a four year degree (*licenciatura*) that would almost equal them to doctors, dentists or psychologist’s. The struggle for increasing professionalisation is quite clear in this debate. The General Council of Nursing, the organism in charge of representing the nurse profession, pleads for the necessity of the implementation of such a degree to consolidate the nursing profession according to present times.

In very close connection with this, we must take into consideration the extremely recent reform of Nursing Specialisations (Royal Decree 450/2005, of April 22nd). The General Council of Nursing sees it as a historical milestone, comparable to that of 1977, when nursery entered in the university system. This Decree radically reforms the obtaining of the Specialised Nurse Diploma by setting up a system very similar to the doctor’s one. Once the nurse degree is obtained, a nation-wide exam has to be passed. The exam establishes a ranking that is used to access the different Training Units (*Unidades Docentes*) were each Specialisation takes place. It is a full time training, in a regime of mentored training. During their residence in the unit, nurses are subject to evaluation. When the period finished and all evaluations passed, the diploma is awarded (all timing is still not specified).

The system is not compulsory and acknowledges the status of “generalist nurse” (*enfermera generalista*), those not specialised. The new regulation also means the total dismantling of old specialisations and the setting up of 7 new:

- Midwife
- Mental Health
- Geriatrics
The Decree, just passed, also sets up an implementation schedule, with the new system to be working in January 2007 and all specifications (with several different commissions in charge) to be negotiated in the meantime.

The new specialisation design complements the 44/2003 and 55/2003 Acts, that accomplish the long pending definition of health professions. The General Council of Nursing conceives all these recent changes to be “the re-foundation of the nursing profession” (2005: 2) and the end of a legislation that had considered nursing to be “a profession always at the service of other and never at the service of society” (2005: 3). For them, it was not possible, rigorously speaking, to talk of ‘profession’, since there was “no definition, no autonomy, no responsibilities”. The subordinate character of nursing has been finally overcome, since the mission of nursing is “to give health care to individuals, families, and communities during all stages of life and development”. This allows the enunciation of a new definition of nurse: “a professional legally entitled, responsible of her professional acts, with knowledge and aptitudes enough over her field and who bases her practice in scientific evidence” (ibid.).

In 1960 (Decree 2319/60) the professional competences of nurses were:
- Apply medicaments, injections and curative treatments
- Assist doctors in their interventions
- Give assistance, in case of emergency, in the absence of any superior professional
- Assist childbirths when in absence of midwives

Now, always according to the Council, it is possible to talk about nurses’ own functions: assistance, research, teaching, and management. And finally, professional competences: “the aptitude of the professional to integrate and apply knowledge, skills and attitudes associated to her profession’s good practices in order to resolve problems in everyday practice” (ibid.: 7).
Chapter 7

A Brief Literature review of the Periodisation of restructuring in Teaching and Nursing in Ireland

Ciaran Sugrue and Maeve Dupont

Awareness of and familiarity with reform efforts over the past 3 decades made the task of reviewing literature relatively easy. Additionally, it is since the 1990’s that the pace of reforms has accelerated and, in many instances, there is electronic access to the more recent reports, documents and annual statistics. The college library was consulted to find hard copies of most of the major reports. Information and publications were also sought from the teachers’ unions in particular.

Sources of funding for educational research are limited. The Department of Education and Science (DES) has an annual budget to commission evaluation or pilot studies but the manner in which the tendering process functions could be much more transparent. Funding is also available from the Irish Research Council for Health and Social Sciences (IRCHSS) but the number of education proposals submitted is very modest with the result that very little education research receives funding from this source. Funding is often in the form of doctoral and post-doctoral fellowships rather than for research projects per se.

Within the faculties of education funding is available on an annual basis for small-scale projects, while in recent years efforts have been made to create research consortia at an inter-constitutional level with some evidence of initial success. Large-scale studies and surveys tend to be conducted by the Education Research Centre (ERC) or the Economic and Social Research Institute (ESRI) on behalf of the DES which means that others are excluded from the tendering process. As research becomes more of a priority for individuals, as well as institutions, there are more individuals seeking limited funding with the result competition has increased and much time and effort is spent on writing proposals. Given the size of the majority of education departments, success and expertise is limited.

Issues causing concern among teachers today include: overload in terms of demands on teachers, pace of change and number of reforms, fear of increasing accountability agenda (particularly the increase in amount of paperwork required for planning and record keeping).

A general overview of the Irish educational system will be presented. Educational restructuring in Ireland will then be examined according to the following periodisation.

1960’s/70s: Structural change as reform
1980’s: Consolidation and secularisation
1990’s: Opening the floodgates of reform
2000-present: Continuing to navigate the rapids of reform

A Literature Review of Welfare State Restructuring in Education and Health in European Contexts: Implications for the Professions and Professional Knowledge
The Irish Education System

Education in Ireland is compulsory from age 6-16 or until students have completed three years of second level (post-primary) education. While there is no national provision for pre-schooling in Ireland, first level schools accept pupils on or after their fourth birthday. The typical first level school enrolls pupils by age into eight-year groups or classes. The vast majority of schools are State funded, privately owned (by the Catholic Church) and ‘vertical’ schools catering for pupils from 4-12 years of age. The curriculum followed is a child-centred one and it allows for some flexibility in timetabling and teaching methods. As the vast majority of teachers are employed in denominational schools, they are obliged to provide religious instruction for approximately 30 minutes daily as a condition of their employment.

The second level education sector comprises secondary, vocational, community and comprehensive schools. Secondary schools are privately owned and managed. The trustees of the majority of these schools are religious (Catholic) communities or Boards of Governors. Vocational schools are State established and are administered by Vocational Educational Committees (VECs) while community and comprehensive schools are managed by Boards of Management of differing compositions. While each category of school evolved from a distinctive historical context and has different ownership and management structures they have a great deal in common. They are largely state funded and follow the same State prescribed curriculum and take the same State public examinations.

The second level school span is predominantly a six year cycle, taken by ages 12-18. The terminology of ‘lower secondary’ and ‘upper secondary’ is not used in Ireland but the terms ‘Junior Cycle’ and ‘Senior Cycle’ are commonly used.

There are two key public examinations taken by students - the Junior Certificate (age 15/16) and the Leaving Certificate (age 17/18). These are external examinations set by the State Examinations Commission. A great deal of public attention is focused on the Leaving Certificate Examination as entry to third level education is closely linked to the results achieved by students at this examination.

Pre-school education is provided in the main by privately funded childcare facilities. The Department of Education and Science funds some pre-school initiatives focusing in particular on children at risk.

In the last thirty years there has been a significant growth in the number of Irish medium primary schools (approximately 140), and these compete for pupils with local national schools. Similarly, but more recently, the multi-denominational sector is undergoing expansion and the inter-denominational sector to a lesser extent.

From a constitutional perspective, Irish is the country’s official first language. The State no longer espouses a policy of language revival but the rhetoric speaks of an acceptable level of bilingualism, and, towards this end, compulsion is retained throughout primary and secondary schooling, with exemption being
granted to those born outside the state and who do not enter the education system before the age of ten.

Until very recently, it was not possible to gain a pass in the Leaving Certificate Examination (LCE) without gaining a pass in the Irish language examination, and it continues to be a matriculation requirement in virtually all of the Universities.

Primary teacher education programmes are located in five denominational Colleges that are on separate campuses with affiliation to or constituent college status within adjacent Universities. Four of the five denominational colleges are owned by the Catholic Church or religious orders while the fifth is the property of the Church of Ireland. Primary and secondary teachers continue to receive their professional formation separately; the former in colleges, the majority of the latter, in education departments within the Universities. For second level teachers, training usually involves completing a primary degree in university or other third level institution, and a one year Higher Diploma in Education. There are also teacher training colleges that specialise in the training of second level home-economics teachers and teachers of religion.

1960’s/1970’s: Structural change as reform
It was not until the publication of Investment in Education (OECD, 1966) that the significance of education for economic expansion energised some politicians and civil servants. Up until the end of the 1960’s secondary education was left almost entirely to religious orders. Only a minority of primary pupils transferred to secondary schools, all of which charged a tuition fee, and however modest, it was beyond the means of many. Universal (free) secondary education was introduced in 1967. The majority of fee-paying Catholic secondary schools opted into what was euphemistically described as the ‘free scheme’, thus such schools became eligible for maximum state support.

In 1967 the Primary Certificate was abolished in order to facilitate the introduction of the 1971 Curriculum (Government of Ireland, 1971). The Primary Certificate was a State exam at the end of first level education and was indicative of the fact that the vast majority who attended primary school did not progress to second level. In many respects it was the Leaving Certificate Examination of its time. The 1971 curriculum has been characterised repeatedly as a “radical” departure from the past - a move away from centralised prescribed curricula that were teacher-driven to a professional pedagogy characterised by local school autonomy. In effect a rhetoric of child-centredness was adopted and very quickly embraced by teachers.

Another significant event during this period was the introduction of a Bachelor of Education (B.Ed) programme in 1974. In the case of the two larger primary teacher education institutions the degree was awarded by the National University of Ireland, while the three smaller institutions affiliated to Trinity college (TCD). This Degree replaced a two-year Diploma Programme that was based on apprenticeship, awarded by the Ministry of Education, and whose inspectorate was its external examining body.
Further provision was provided in the form of a one-year graduate programme. It was first introduced as an entry into primary teaching in the late 1970’s in response to a shortage of teachers, but was quickly discontinued in 1981 after the crisis abated.

Since 1966, a maximum of 10% of places in primary teacher education are ‘reserved’ for candidates from Gaeltacht (Irish speaking) areas. A small number of places continue to be allocated to such candidates annually and their LCE results are, in many instances, significantly lower than applicants who are allocated places through the Central Applications Office (CAO), the Irish equivalent of the English UCAS.

As previously mentioned most primary schools are owned by the Catholic church. Prior to 1975, the local clergyman, typically the Parish Priest, was the manager of the local national (primary) school. Since that time primary schools have Boards of Management (BoMs) with parent, teacher and community representation, and it is no longer axiomatic that the chairperson of the board be clerical, while in many rural schools this continues to be the case.

1980’s: Consolidation and secularisation
The dramatic decline in the number of religious vocations became increasingly evident during the 1980’s. The number of lay teacher staff in secondary schools grew, and several such schools appointed lay principals for the very first time.

Since 1980, the education of traditional craft teachers and others have, rather like the colleges of education in the primary sector, entered the university orbit also through a series of links and relationships.

In 1984/85 the Central Applications Office (CAO) which processes other student applications for third level education, took over the application system for all pre-service primary teacher education. Interviews continued to be held (before the release of the Leaving Certificate Examination results) for the following two years. However, the process of interviewing every applicant who had included teaching on their CAO form (as one of their ten preferences) proved to be a logistical nightmare. Thus the interviews were discontinued in 1987.

In the early 1980’s, the probationary period for beginning primary teachers was reduced to one year. Assessments continue to be carried out by the primary inspectorate to this day. Since the introduction of a pilot induction project in 2002, there is greater separation between induction and probation and it is anticipated that probation may become the responsibility of school principals in the near future.

A ‘transition’ year was introduced in 1986. Transition year is rather like the ‘gap’ year in England except that, in the Irish context, it is positioned between the three-year junior cycle and the two-year senior cycle of the secondary system. The aim of Transition year is to educate students for maturity with an emphasis on personal development, social awareness and skills for life (DES, 2004). As a result of transition year, students are now more likely to be eighteen on leaving secondary school, as more schools decide to make the transition year compulsory rather than optional.
**1990’s: Opening the floodgates of reform**

In the early 1990’s, two National Institutes of Higher Education were elevated to University Status, and St. Patrick’s College and Mary Immaculate College Limerick subsequently signed formal linkage agreements with these new universities, an initiative inspired by Government rather than College authorities.

Projected recruitment into primary teaching was seriously underestimated in 1990 (Sexton, 1990) and the graduate programme, now extended to a period of 18 months, was resuscitated to avert the crisis. Effectively, the content of the Graduate Diploma in the two major colleges includes the education component of the BEd without the Academic subjects.

After the publication of the OECD report on the Education system in Ireland in 1991 (OECD, 1991), there followed a Government Green Paper (consultative document) in 1992 (Government of Ireland, 1992). A widespread process of consultation followed and this culminated in a National Education Convention in 1993, where all of the major partners were participants. A report emanating from this forum became the basis of a Government White Paper in 1995 (Coolahan, 1994 and Government of Ireland, 1995). As all teacher education programmes are accredited within the University system, and there are no agencies or organisations with a brief to oversee the content of these programmes, education faculties in Universities and Colleges enjoy significant autonomy in comparison with other systems. However, the report that provided the final impetus for the establishment of a Teaching Council recommended a series of committees within the Council structure, including one with responsibility for policy on initial teacher education (Government of Ireland, 1998a). It is likely, therefore, that this new (self-regulating) body will be much more specific in its requirements regarding the content of teacher education programmes.

The White Paper (Government of Ireland, 1995) identifies a number of issues that it considers worthy of note:

- A concurrent model of teacher education will be retained for the initial training of primary teachers
- Pre-service courses should not be narrowly confined to the immediate requirements of the system but should include the personal education and development needs of students
- There is a need to strengthen and prioritise the education of student teachers in the creative and performing arts and in the scientific aspects of the social and environmental programme.

The White Paper (Government of Ireland, 1995) is quite overt in its criticisms of the professional formation of secondary teachers. It states: “Some disquiet has been expressed about the adequacy of the Higher Diploma in preparing students for a career in teaching.” Being cognizant of this ‘disquiet’, “a systematic review of pre-service education for second-level teachers” is recommended to be undertaken by the Higher Education Authority (HEA). Important features that “should underpin the professional preparation of second-level teachers” are stipulated. They include: maintaining a ‘mutually reinforcing balance’ between
personal and professional development as well as between theoretical and practical preparation; and extending student teachers’ repertoire of teaching skills by having a number of school placements (rather than just one which continues to be the norm).

This policy document also enunciates that: “a well-developed and carefully managed induction programme, coinciding with the teachers’ probationary year, will be introduced for first- and second-level teachers” (emphasis in original).

In the early 1990’s, the Department of Education and Science (DES) established an In-Career Development Unit (ICDU) to plan and co-ordinate in-service provision. The extent of provision and the number of providers has ‘exploded’ in the intervening decade, but largely in an ad hoc manner driven by waves of reform initiatives rather than anything resembling coherence (see Sugrue et al. 2001). This expansion has been largely a consequence of widespread curricular reform. For example, junior and senior cycle programmes in secondary schools have been significantly altered in terms of content, pedagogy and modes of assessment, and there were single initiatives in the primary sector such as Stay Safe, Relationships and Sexuality Education, before the DES launched an entire ‘revised’ primary curriculum in September 1999 (Government of Ireland, 1999a). However, proliferation of programmes and providers has increased fragmentation of provision rather than improved cohesion, while in a context of increasing provision, participants have become more selective and critical.

The introduction of the revised primary curriculum (1999) influenced changes in: teaching methodologies; the role of the teacher; curriculum structure, and classroom management and planning. The curriculum also has had an impact at the micro level in terms of individual areas of the curriculum. Drama and Social Personal and Health Education (SPHE) are new additional subjects in the primary curriculum. The subjects which evidenced the greatest change from the previous curriculum are: Social Environmental and Scientific Education; and Physical Education. Also of significance are the recommended use of Information and Communication Technologies (ICT) and a communicative approach in Irish. There is a renewed emphasis on oral language in English and on the Arts, and greater attention to estimation skills and real life problem solving in mathematics. Approaches to pupil assessment have also had to reflect the basic principles of learning in the revised curriculum.

These reforms have placed additional burdens on initial teacher education programmes that were already overloaded. Information and Communications Technology (ICT) has been added to initial teacher education programmes, as well as Drama and SPHE. Recent additional emphasis on early childhood education, mainstreaming children with special needs etc., increases pressure on existing provision even further.

During the 1990’s as the country grew increasingly prosperous, secular and consumerist, there was a significant growth in the number of multi-denominational schools and these compete for pupils with local national schools. While there are currently approximately forty such schools there are plans by its
umbrella organisation (Educate Together) to increase this number significantly within five years. The growth of this sector in particular in recent years has been greatly facilitated by a Government decision to fund entirely the establishment of such schools.

The Education Act (1998) provided the impetus for a number of changes in the Irish Education system. The Act contains a comprehensive and inclusive definition of disability and special educational needs. It states that the Minister has to ensure that there is made available to each person, including those with a disability or other special educational needs, an appropriate level and quality of education and appropriate support services. Hence, each school has to ensure that the educational needs of all students, including those with a disability or other special educational needs, are identified and provided for.

Issues addressed by the Education Act (1998) include: continuous professional development for teachers, admission policies, and combating educational disadvantage. According to the Act, schools must identify and provide for staff development needs, including the needs of staff involved in the management of the school. The Act provides for the establishment of the statutory Educational Disadvantage Committee to advise the Minister on policies and strategies to combat educational disadvantage. The notion of transparency with regard to admission procedures is highlighted. Each school must publish its policy concerning admission to and participation in the school. In addition, the establishment of school councils at post-primary level is recommended.

The Department of Education and Science (DES) published a White Paper on Early Childhood Education (Government of Ireland, 1999b). As part of the process of implementing the White Paper, the Centre for Early Childhood Development and Education was established in 2001. The centre became operational in 2002. Developing targeted interventions for children up to six years of age who are disadvantaged or who have special needs and building on the experience of existing initiatives are among the responsibilities of the centre.

The economic boom of the late 1990’s meant that there was more money available for the Education budget. As a result various initiatives for tackling disadvantage were introduced. Several programmes were established in primary schools to address problems associated with disadvantage (see Murphy, 2000). The most significant are the Home School Community Liaison Scheme, Breaking the Cycle and Early Start. Since 1990, a scheme of Assistance to Schools in Designated Areas of Disadvantage has also been in operation. More recently, plans for a considerable enhancement of provision were announced in the New Deal (Department of Education and Science, 1999).

In the late 1990’s there was an attempt to create a collective approach to management. The DES developed the new management structure in order to help create a culture of shared leadership, devolved responsibility and collegiality in schools. The nomenclature changed to reflect the new management. Vice Principals became known as Deputy Principals. Those with ‘A Post’ and ‘B Post’ positions of responsibility became known as Assistant Principals and Special Duties Teachers respectively. Available evidence suggests that the implementation has been patchy (O’Diomasaigh, 2003).
2000- present: Continuing to navigate the rapids of reform

While in the past Ireland had a limited range of educational legislation, recent years have witnessed a significant amount of new education legislation. Notable in this regard are the Education Act, 1998 (as previously mentioned) The Education Welfare Act, 2000 and Education for Persons with Special Educational Needs Bill (2003).

The Education Welfare Act (2000) repealed the 1926 legislation on school attendance. It provides a framework within which issues relating to the educational welfare of children including the causes and effects of non-attendance at school can be addressed effectively. Teachers must be consulted in matters such as identifying students at risk of poor school attendance. Principals must report individuals to the Board if they are absent for 20 days. The Act also provides for the first time for the identification of children who are being educated outside the recognised school system and for a structure to ensure that the education (which is being provided to them) meets their constitutional rights.

The Education for Persons with Special Educational Needs Bill (2003) (changed from Education for Persons with Disabilities Bill 2003) is designed to underpin the rights of students with disabilities. The purpose of the Bill is to make detailed provision for the education of children with educational disabilities. The main provisions of the Bill include the following:

- Parents of children with disabilities to have a central role in all important decisions concerning the education of their children;
- Integrated inclusive education to be the general approach to the education of children with special educational needs;
- A child with an assessed educational disability to have a detailed goals-driven individual education plan, which is to be regularly reviewed;
- The policies and operations of the various agencies engaged in delivering education related services to be co-ordinated and consistent;
- The establishment of a National Council for Special Education.

The National Council for Special Education was established in 2004 as an independent statutory body by Order under the Education Act 1998. The Council aims to provide the right structure to deliver an effective and speedy education service to children and families coping with disability on a daily basis. The Council has created positions for approximately 80 Special Education Needs Organisers (SENOs) (Curtin, 2005, p. 10, Solas January/ February).

The establishment of The Teaching Council (Teaching Council Act, 2001) represents considerable progress in maintaining quality standards of teaching. It is an independent statutory agency. The three Teachers’ Unions have campaigned for almost two decades for its establishment. Their primary motivation was that teaching would be better recognised as a profession if and when it had its own self-regulatory body. The majority (22 out of 37) of its
members are teachers (16 of whom were elected by teachers themselves). Its first Director was appointed in 2004.

Objectives of the Teaching Council include: regulating the teaching profession and the professional conduct of teachers; reviewing and accrediting programmes of teacher education; promoting the continuing education and training and professional development of teachers; establishing and maintaining a register of teachers; establishing procedures in relation to the induction of teachers and procedures and criteria for probation of teachers (Government of Ireland 2002b).

After several false starts, a pilot induction project began in the primary and secondary sector in 2003, and has been extended for a further year to include the school year 2004-'5. It is generally accepted that one of the reasons for the extension to this initiative is the postponement of the challenge to provide appropriate personnel and infrastructure for induction on a national and ongoing basis. Once again, it is anticipated also that responsibility for the long-term future of this necessary and overdue initiative will fall to the Teaching Council.

At the beginning of the 21st century, two separate ministerial committees were created to review provision in initial teacher education. The consultation process led to the publication of Preparing Teachers for the 21st Century, Report of the Working Group on Primary Pre-Service Teacher Education (Government of Ireland, 2002b) and Advisory Group on Post Primary Teacher Education (Government of Ireland, 2002a).

The primary pre-service report itself is a conservative document. There was no direct representation from the Colleges of Education on the review group, and its major recommendation was to extend the B.Ed to four years, and the graduate Diploma to two years, with recommendations also as to how this additional year might be utilised. The same report (Government of Ireland, 2002b) required each of the teacher education colleges to respond to its recommendations within a year of its publication. However, whatever impetus this report may have had is lost by now. Consequently, pressure for reform of this sector is more likely to come from the newly established Teaching Council, rather than from the teacher education community.

The report on reform of initial teacher education in the secondary sector (Government of Ireland, 2002a) places heavy emphasis on reflective practice and portfolio development as well the allied notion of the teacher as researcher. In this regard, the secondary sector report seems to be imbued more with international discourses on teacher education reform than its primary counterpart. However, while this report was prepared for publication it was neither launched nor distributed.

Since the launch of the revised curriculum (Government of Ireland, 1999a) there is general recognition that lifelong learning will have to become the norm, when policy states that “initial teacher education cannot be regarded as the final preparation for a life-time of teaching.”(Government of Ireland, 2002b). Each primary teacher is currently in receipt of six professional development days per annum, typically organised on the following basis- 4 days out of school and two days working collaboratively with colleagues in school or, in clusters in the case...
of small rural schools. Except for more recent provision, there has been almost no attempt to create a differentiated programme with the majority of courses being of short duration without subsequent follow-up or support at the level of the school (Sugrue et al., 2001). However, professional support for the implementation of the revised primary curriculum is beginning to provide support of a more sustained, differentiated and targeted kind. Towards this end, a Cuiditheoir (Support) person is made available to a number of schools through their nearest Education Centre, while anecdotal evidence suggests that this has had uneven impact, very dependent on the skill, interpersonal and otherwise, as well as expertise of the individuals concerned.

School principals have recently been identified as a priority group needing professional support, (OECD, 1991 and Department of Education and Science, 2000) and this has resulted in the provision of the Leadership Development for Schools (LDS) initiative. However, much energy has been expended on provision to the relative neglect of other aspects of professional development such as policy formulation, capacity building, evaluation and research (Sugrue et al., 2001). This provision has been evaluated recently and the report recommends the expansion of provision (Morgan and Sugrue, 2005).

In the last few years there has been a proliferation of new statutory bodies: National Council for Curriculum and Assessment (NCCA), National Welfare Board, National Council for Special Education, Teaching Council and the National Parents’ Council. In addition, voluntary bodies have been established. They include the Irish Primary Principals’ Network (IPPN) and the National Association of Principals and Deputies (NAPD) which is the post-primary equivalent. In both instances members continue to belong to their (‘parent’) teacher unions. There are tensions too in the power struggles that ensue. Nevertheless, all of these bodies statutory or otherwise are indicative of increasing complexity within the Education system, and indicative also of various groups seeking to have their issues and interests represented and heard in the agora of education.

In conclusion, restructuring has only started recently in Ireland and there is a lack of literature about on the topic. Despite a massive injection of funding during the past seven years or so (see OECD, 2004), research capacity generally remains underdeveloped. This is particularly the case in Education Departments in Colleges of Education as well as in Universities. Traditionally, academic staff were hired to teach, while research was perceived as something that was done idiosyncratically and at ‘one’s leisure’. Nevertheless the new educational bodies, such as the NCCA and the National Council for Special Needs, all have a research brief and should contribute to the knowledge-base.

**Recent trends in restructuring in Education in Ireland**

**Decentralisation v centralisation**

Many aspects of the administration of the Irish Education system are centralised in the Department of Education and Science. The Department sets the general regulations for the recognition of schools, prescribes curricula, establishes
regulations for the management, resourcing and staffing of schools, and centrally negotiates teachers’ salary scales.

However, in recent years the Department has undertaken a programme of restructuring which aims to delegate functions to external agencies (e.g. State Examinations Commission) and establish a network of regional offices. The idea is that this will allow the Department to focus on policy issues and “meet the challenges and expectations for education into the future” (DES, 2004:23)

The White Paper policy document argues that “the approach to professional and personal development should be decentralised, school-focused and conducive to high levels of teacher participation.” (Government of Ireland, 1995:125). Recent support for primary teachers in relation to the revised primary curriculum and whole-school development planning are moving in this direction (Sugrue et al., 2001)

The national network of Education centres may be seen as the DES divesting itself of day to day responsibility while continuing to maintain control. Until very recently these centres were controlled by the teaching profession, but since the Education Act (1998) they have become part of the DES apparatus to deliver reform measures. Towards this end, some of the larger centres have become the locus for control of national initiatives such as a) School Development Planning, and b) Leadership Development for Schools. As a significant ‘symbol’ of this shift in function and locus of control, what were until then designated as ‘Teachers’ Centres’, were re-packaged as ‘Education Centres’.

**Marketisation/ privatisation**

Over the past decade in particular large urban centres have witnessed the growth of what have become known as ‘grind schools’ that do not receive any state funding. They market themselves on their capacity to maximise ‘points’ and thereby facilitate entry to the most sought after faculties in universities. Many students who attend non-fee paying schools also attend these ‘grind schools’ in the evening, at weekends and during holiday periods for tuition in individual subjects. Needless to say this has become a major pursuit for those with the resources to purchase these services. These developments contribute considerably to the development of a mindset that education is a product that can be modified, bought and sold.

In 2003, a private provider, Hibernia College, accredited a Diploma programme through the Further Education Accrediting body, and had the programme recognised by the Department of Education and Science. This marks a significant ‘benchmark’ in the Irish context, and has many of the hallmarks of a privatisation agenda, though it is frequently presented by the DES as a necessity due to the inability of existing providers to meet demands. In the context of various EU initiatives, this is a significant development, and a general indication of the impact of market forces and deregulation of the sector.

**Feminisation**

Today, approximately 90% of student intake across all primary teacher education institutions is female, and male intake in the Church of Ireland college is almost non-existent. According to Lewis and Kellaghan (1993) there are three
times as many women teachers as there are men teachers in primary schools. In 1985 only one in five principals was a woman. In 1993, more than two in five principalships were held by women. The same report asserts that there is gender imbalance in the representation of women teachers in the junior and senior grades of primary school (except in all girls’ schools in which all grades are taught almost exclusively by women). Teachers in junior grades are disproportionately female, while teachers in senior grades are disproportionately male.

**Secularisation**
There have been no new Catholic schools in the Dublin diocese in the past four years. However, there has been an unprecedented growth in multi-denominational schools. Pupils in these schools do not receive formal religious instruction during school hours. Each religion has the option of providing instruction after school hours. In this respect multi-denominational school are effectively non-denominational. The recent support for the development and establishment of schools may be indicative of increasing secularisation where parents are seeking to distance themselves from denominational schooling.

Further evidence of secularisation is evident in the fall off in vocations over the past 30/40 years. However, primary teacher education provision continues to be almost exclusively denominational.

**IT expansion**
Increasingly, Information and Communication technology (ICT) is being recognised as a key educational resource. The National Centre for Technology in Education (NCTE) was established under the auspices of the DES in 1998. As the Government’s agency on the use of ICT in education it plays a central role in helping to maximise the benefits for learners and teachers in using ICT (see http://www.ncte.ie/AbouttheNCTE/). It also has responsibility to manage the implementation of the Government’s ICT in schools programme, to develop ICT policy proposals for the DES and advise on issues relating to ICT and learning and teaching. The NCTE advises and supports first and second level schools in relation to: ICT planning and infrastructural development, interactive learning resources, and ICT in special needs education. It supports innovative projects in ICT in education and develops and funds the rollout of a range of ICT courses for teachers. The Centre is also responsible for the development of ScoilNet- the portal website for Irish schools.

Education Institutions in Ireland have recognised the advantages of digital technologies for disseminating good practices in teaching and learning. The TeachNet Ireland project is hosted by St Patrick’s College, Drumcondra and it provides grants to classroom teachers for the publication of curriculum resources on the Internet. The project also provides networking and ICT professional development opportunities for teachers. TeachNet Ireland’s goal is to encourage Irish teachers to publish quality curriculum content on the web in order to increase classroom usage of the Internet at primary and post-primary level (see http://www.teachnet.ie/).
Migration
During the economic boom years of the late 1990’s and early 2000’s, significant labour shortages developed which had a negative impact on economic growth. The number of workers from EU countries was not sufficient to meet the economy’s labour needs. As a result work permits were issued to Non-EU citizens to fill specified jobs. In 2004, 34,054 work permits were issued to Non-EU citizens. This shows a substantial increase from 2000 when only 18,000 such permits were issued (see NCCA, 2005). Another group of recent immigrants to Ireland comprises those who are seeking asylum. Between the years 1991-2004, the number of people seeking asylum rose from 31 to 4,766 (NCCA, 2005). Therefore the growth in ethnic and cultural diversity in Ireland has taken the form of increased movement from other E.U countries as well as increases in asylum seekers and in those issued work permits. These changes have brought the issue of cultural and ethnic diversity to the forefront of national policy and have encouraged discussion in relation to such diversity.

One response to the issue of cultural and ethnic diversity is the publication of ‘Intercultural Education in the Primary School – Guidelines for Schools’ (NCCA, 2005). The aim of these guidelines is to contribute to the development of Ireland as an intercultural society based on a shared sense that language, culture and ethnic diversity is valuable. It is hoped that the guidelines will support teachers, both individually and as teams in developing a more inclusive classroom environment. They aim to support whole school planning and policy development within schools and to contribute to developing a school culture that is respectful and sensitive to the needs of children.

Europeanisation
For the past decade, in particular, official reports Green/White Papers (Government of Ireland, 1992, 2995, 1999) have typically included sections on references to E.U membership of having a dual citizenship - Irish and European. This mindset has been frequently underpinned by a kind of economic imperative that since the E.U has been so generous to Ireland economically, we must reciprocate by supporting E.U initiatives, Treaties etc. Voting twice on the Nice treaty, for example, until we got the “right” answer is frequently cited as evidence of this thinking. However, Brussels is typically portrayed as a gravy train for bureaucrats and politicians removed from the daily realities of Irish citizens. Consequently, there is a considerable gap, partly along class lines, between the rhetoric of ‘Europeanness’ and the realities of daily life in “rip off” Ireland, a constant reference to the cost of living here, the most expensive country in the E.U in which to live.

Decline/expansion of unions
Close to 100% of primary teachers are members of The Irish National Teachers Organisation (I.N.T.O). Such high levels of union membership suggest that there is a strong need to protect their interests. The current membership of The Association of Secondary Teachers in Ireland (ASTI) is estimated at over 17,000. This constitutes approximately 66% of second level teachers in Ireland. The Teachers Union of Ireland (TUI) also represent 2nd level teachers. Approximately 9,750 second level teachers are members of TUI. Thus it is estimated that 38% of second level teachers are members of the TUI.
Recently there was a bitter industrial dispute by the Association of Secondary teachers of Ireland (ASTI), who withdrew from membership of the Irish Congress of Trade Unions and the Programme for Prosperity and Fairness and did not participate in the government appointed Benchmarking process set up to examine public salary relativities with the private sector. The Association expressed grave dissatisfaction with prevailing salary scales of teachers all of whom are paid on a common salary scale with extra allowances for some qualifications and the exercise of special duties posts in schools. The dispute continued for almost three years, in the course of which relationships between the ASTI and parents and the general public became fraught.

Supply
Due to increase in population, a combination of net immigration, new immigrants, and a decline to negligible proportions of emigration, there is a shortage of primary teachers and many students go to England and Wales to complete a one-year PGCE programme with every intention of returning to Ireland on completion.

The shortage of qualified staff has been evident in both the primary and secondary sectors, until the current school year (2004-'5). Economic success in recent years has opened up many more lucrative opportunities for young graduates. Consistent with the experience in other jurisdictions, the secondary sector has particular difficulty recruiting and retaining mathematics and science graduates. Consequently, Dublin City University in 2000 began a new integrated four-year degree programme in Science and Education to address this particular concern.

Implications for Teachers in Ireland

Professions
Secondary teachers number approximately 17,000, the vast majority of whom are members of the Association of Secondary Teachers in Ireland (ASTI). This union disaffiliated from the Congress of Trade Unions in 2001 and has gone through a period of internecine ‘warfare’ from which it is currently recovering. In some respects, this external and internal conflict has been due to restructuring within the public sector generally and a perception among union members of a loss of status and relative remuneration.

Given that restructuring has occurred in Ireland more recently than elsewhere, it is too early to say what the impact and implications for the teaching profession are likely to be. Due to an absence of research (other than anecdotal evidence) it is not possible to say with any degree of certainty.

Professional Knowledge
There is increasing multi-culturalism in Ireland, as a consequence of unprecedented influx of international students, some from within an expanded EU, with others from other counties such as Nigeria and Bosnia. Furthermore, recent legislation, Equality (1998), Welfare (2000), and Disabilities (2003), means that the previously homogenous education system is being seriously challenged on several fronts at once. In many instances, lack of knowledge base,
particularly in the area of ‘inclusion’ and special needs as well as multiculturalism, indicates that many teachers are having their established mindsets and pedagogical routines severely challenged.

While increasingly, in a knowledge economy, there is a much greater emphasis on research and innovation in the University sector, and there has been a massive injection of funding in this regard during the past seven years or so (see OECD, 2004), research capacity generally remains underdeveloped. This is particularly the case Education Departments in Colleges of Education as well as in Universities. Traditionally, academic staff were hired to teach, while research was perceived as something that was done idiosyncratically and at ‘one’s leisure’. Nevertheless the new bodies mentioned earlier: NCCA, National Council for Special Needs etc all have a research brief. This will contribute to the knowledge-base. The challenge will be to provide appropriate Continuous Professional Development to increase, renew and sustain capacity in schools.

**Professionalisation**

It is difficult to say to what extent restructuring has led to teachers gaining status and resources for themselves. The establishment of the Teaching Council in 2004 as a self-regulatory body for the profession represents considerable progress. It is likely to have important effects on the professional development and induction needs of teachers. However it is too early to evaluate its impact on the profession.

According to an OECD report (2003) there are signs that the previously respected role of teachers may be under threat. It may well be that we are currently in a transitional era. Signs of this emerged in the context of a recent bitter industrial dispute between the Association of Secondary teachers of Ireland (ASTI) and the Government. The dispute over pay and conditions continued for almost three years, in the course of which relationships between the ASTI and parents and the general public became fraught. Media coverage conveyed a new asperity in public comment on the teaching profession, which is likely to leave a residue in public-teacher attitudes at least for some time.

Furthermore, in the new economy with proliferation of new occupations, it is generally accepted that the status of teachers generally has declined in a more educated society. OECD (2003) report that an older tradition may be changing whereby many teachers no longer encourage their sons and daughters to follow in their professional paths, but to aspire to other careers in a greatly diversified job arena. In addition, the recent shortage of teachers meant that unqualified personnel were drafted in to work as teachers. This may have had a negative impact on the occupational prestige of the teaching profession. Possibly the unqualified members of staff were unconsciously incompetent. Furthermore, there is a widespread view that the part-time nature of the Hibernia teacher education course is damaging to professional status and prestige. The Government decision to accredit this course is unlikely to enhance the status and public perceptions of teachers.

**Professional Autonomy**

Until very recently, schools as a whole were inspected every 4-6 years. This process (which was largely ritualistic, benign, and without sanction) has...
metamorphosed into Whole School Evaluation (WSE). With a united inspectorate (primary, post-primary and vocational inspectorates were traditionally separate), and a series of pilot WSEs under their belt, a more rigorous inspection regime is now being deployed in both the primary and post-primary sectors. This may influence teachers’ perceptions and feelings of autonomy.

Internal accountability measures are on the increase also in schools. Self-evaluation has been strongly promoted by those practitioners who were seconded to work with school staffs on School Development Planning (SDP).

Contrary to the UK system the DES refuses to make available data on the performance of schools. However, journalists, particularly in the Sunday Times (a British broadsheet with an ‘Irish’ version and currently enjoying the highest circulation of all Sunday papers in the Irish Republic) continue to construct crude league tables among secondary schools as to how many of their Leaving Certificate students gain entry to the various universities. Meantime, inspectors’ reports are not publicly available. There was a court ruling very recently that prohibited the release of inspectors’ reports on the grounds that such information is not in the public interest. The absence of League tables in Ireland may enhance Irish teachers feeling of autonomy as compared to their English counterparts. They may feel less pressure to “teach to the test”.

There is potential for the recently established Teaching Council (since it is controlled by the teaching profession) to have a major impact on the autonomy of teachers.

**Professional Identity**

In the absence of research in the setting, it is difficult to give a definition or comprehensive response to this question of changing identity. At least it is probably a mixed and contradictory message. The rhetoric of being able to compete successfully in the knowledge economy suggests that education is more important than ever but the cult of efficiency and accountability is frequently perceived as over emphasising paperwork at the expense of teaching time etc. Due to the massive escalation in the cost of housing, young teachers in particular no longer see themselves being able to purchase houses particularly in the greater Dublin area. This is generally construed as evidence that in the new dot com economy, the skills, expertise and commitment of teachers are no longer valued adequately. Yet there is some evidence that more mature entrants to the Primary Graduate Diploma in particular are turning their backs on highly renumerated and responsible positions in the private sector for greater job satisfaction and meaningful engagement in teaching, as well as being motivated to give something back.

There is general acceptance that teachers no longer enjoy the same respect from students in comparison with the deference in the past. Additionally, due to much more employment opportunities than in the past, many teachers too are choosing alternative careers. Consequently, while the patterns are changing, how these changes are impacting on identity is more difficult to establish. Recent interviews with entrants to primary teaching suggest that it continues to be attractive as an occupation and is being perceived by some, at least, as preferable.
to the Americanisation of work patterns generally. While there are changes in identity where teachers are no longer revered as figures of authority they continue to command respect as making a valuable contribution even if the media enjoys deriding the “laggards” who continue to be employed in the system. Within a much wider occupational continuum there is little doubt that the identity of teachers is being recast while Irish teachers generally perceive themselves as having more agency in the recasting than their colleagues in other jurisdictions.
A Brief Literature review of the periodisation of restructuring in Nursing/ Healthcare in Ireland

Ciaran Sugrue and Maeve Dupont

The literature review was conducted using search engines such as Pubmed, Ingenta and Swetswise. Descriptors such as ‘nursing’ ‘Ireland’ and ‘changes’ were entered in order to generate a list of suitable references. In addition, the website of the Department of Health and Children was consulted in order to locate publications (reports, policies, statistics) relevant to developments in the nursing profession. The Nursing Board (An Bord Altranais) was a valuable source of information regarding the history of education and training of nurses and various guidelines for professional nurses in practice. The college library was consulted to find books documenting the history of nursing and theses that investigated changes in the nursing profession. In particular a report by Sarah Condell ‘Changes in the professional role of nurses in Ireland 1980-1997-A Report prepared for the Commission on Nursing’ proved very relevant and informative. Much of the research referred to in the above report is published in the Irish Nurses Organisation publication called World of Irish Nursing. Schools of nursing and midwifery were contacted in order to source information about the structure and content of the education programme for nurses.

Condell (1998) reports that the vast bulk of nursing research consists of small scale pilot studies undertaken by individual nurses as a requirement for courses. While some of the research is published in peer reviewed journals, much of it remains in dissertations or thesis. The Irish Nurses Organisation publication (World of Irish Nursing) also communicates research findings although it is not peer reviewed.

There are a number of sources of funding for nursing research. There is a distinction between researchers: there are those that investigate nursing knowledge and practice and there are clinical research nurses (who are data managers for medical research).

The government has funded nursing research since 1999. Under the Nursing and Midwifery Fellowship scheme the Health Research Board funds 3-4 Masters or PhDs by research per year. Dublin City University and University College Dublin have a five year programme of nursing research that is also funded by the government. The National Council funds regional projects in regional centres (Nursing and Midwifery Planning and Development Units) that tend to be of shorter duration. Their remit is Human Resource Planning and Professional Development. Research grants are awarded following competitions open to researchers working in any recognised health research institution in the country. Most researchers work in universities and hospitals, but researchers in health boards and voluntary agencies may also apply and be supported. Research teams applying for grants are encouraged to take an all-island approach to their research where appropriate.
Overcrowding in Accident and Emergency units, nurse staffing levels and tackling the hospital superbug MRSA are current issues causing concern among nurses. For the past month, nurses have been holding lunchtime protests at hospitals around the country to highlight conditions in A&E departments.

The Irish Health Service

Broadly speaking, there are three different types of hospital in Ireland but there is very little difference in practice between the first two types:

- Health Service Executive hospitals, owned and funded by the Health Service Executive
- Voluntary public hospitals, most of whose income comes directly from the government. Voluntary public hospitals are sometimes owned by private bodies, i.e., religious orders. Other voluntary public hospitals are incorporated by charter or statute and are run by boards often appointed by the Minister for Health and Children
- Private hospitals, which receive no state funding.

Public health services are provided in what can broadly be termed the public hospitals - Health Service Executive hospitals and public voluntary hospitals. Most of these hospitals also provide private Health Care but they must clearly distinguish between public and private beds.

There are a small number of purely private hospitals that operate independently of state health services in Ireland. If you opt for private care in a private hospital, you must pay the full cost of treatment and maintenance.

Private and semi-private hospital care in Ireland is also provided in public and voluntary hospitals. If you opt for private care in a public or voluntary hospital, you must pay for your maintenance at a rate set from time to time, in addition to public hospital in-patient charges.

Until 2004, the health boards were the statutory bodies responsible for the delivery of health and personal social services in their functional areas. Health Boards have now been replaced by Health Service Executives. (The legal status of the health boards was removed in December 2004 following the passage of the Health Act 2004). The health boards were also the main providers of health and personal social care services at regional level. Health boards were composed of elected local representatives, ministerial nominees and representatives of health professions employed by the board. Each health board had a chief executive officer (CEO), who was responsibility for day-to-day administration and was answerable to the board.

Many other advisory executive agencies and voluntary organisations have a role to play in service delivery and development in the health system. In the past, health boards funded voluntary/community organisations to provide services on their behalf in the region. Until the new health structures come on stream, it is envisaged that this service will continue as normal, with the Health Service Executive Areas now providing this funding.
1970’s -The demise of apprenticeship
In a number of ways the years from the 1970’s to the present day represent broadening horizons for the nursing profession. In effect the period marked the ending of most of the traditional features of Irish Nursing. Membership of the European Union removed much of Ireland’s social and economic isolation, integrated many aspects of Irish life with those of its continental partners, and tied the country into the harmonisation policies of the Union in regard to many occupations including nursing.

Nurse training at this time was carried out in schools of Nursing attached to hospitals where the idea of vocation was central. The trainees learned the skills of nursing from their experienced colleagues while taking part in the work of the wards. The need to provide service meant that there were two intakes of students for training per annum. The programme was described as an ‘apprenticeship’ model of training (An Bord Altranais 1994a) which produced nurses with highly developed practical skills. However, Treacy (1991, p.18 as cited in Condell, 1998) suggests that ‘the experiences of nurse training combine to promote adaptive rather than change oriented responses in student nurses’.

According to ABA (2000) the apprenticeship of training was an excellent one at a time when the skills and required experience were simpler and could be acquired largely within the hospital wards. And it was argued that the manner of choosing trainees (by interview) was appropriate to an apprenticeship system since students could be matched to the characteristics of their trainers and to the demands and the culture of the training hospital itself. However, by the 1970’s strong criticisms were being voiced about the arrangements for young persons wishing to gain admission to the training hospitals. With the introduction of free secondary school education, increasing numbers of students had the necessary educational requirements to qualify for admission to third level colleges or to professional training courses such as for nursing. There were criticisms of the method of selection. It was not always independent or open to public scrutiny.

By 1975 accumulating demands for the reform of the nursing profession in Ireland and the anticipated impact of European Union policies gave rise to the establishment by the Minister for Health of a widely representative working party to take a critical look at the education, training and grading structure of general nurses.

1980’s -Envisioning the future
The Working Party reported in 1980 and became one of the key documents of the period in the formulation of policy. Its recommendations included a revised hospital grading structure and more management grades in nursing; matrons should become directors of nursing with greater emphasis on management of services. It recommended that An Bord Altranais should establish a fitness to practice committee to advise admonish or censure nurses and in the last resort, remove a nurse from the register. The Report also recommended the ending of the traditional practice under which nurses, in effect remained registered for their lifetime and its replacement by a live register requiring annual registration.
Among the Working Party recommendations was the creation of a central applications bureau where all applications for entry to nurse training schools would be processed. This recommendation was widely but not universally welcomed. Some of the training hospitals saw it as an attack on their traditional independence of choice and a threat to their own long established cultural and ethical values. A long consultative process followed the publication of the report of 1980. Eventually in 1984 the Nurses Bill (1984) was brought before the Dail (Parliament). It proposed implementing many of the recommendations in the report. The Bill was subsequently enacted without significant change as the Nurses Act, 1985. In accordance with the Nurses Act 1985, the Board introduced a live register in 1987. Within a few months 28,000 applications were received for inclusion on the register and most of the nurses then working had been registered and had paid the new retention fee.

The Fitness to Practice committee was established toward the end of 1986 as provided for in the Act of 1985. The purpose of the committee was to investigate complaints against nurses including the possibility of enquiry into fitness to practice of individual nurses if deemed appropriate.

In 1980 a student in a general nurse training certificate programme was a salaried service provider and so occupied a dual role of learner and employee (An Bord Altranais 1994a). The three year programme consisted of 28 weeks of theory, the delivery of which occurred in hospital based Schools of Nursing. The remainder of the time was spent in clinical areas. This structure stemmed from the E.U directives 77/452/EEC and 77/453/EEC which were implemented in 1979. The directives also meant that the specified areas of obstetrics, paediatrics, geriatrics, community care and psychiatric nursing were added to the clinical experience required in the general training programme. This had implications for hospital budgets as students had to be seconded away from the service area. In most seconded clinical areas the student nurse was in addition to the staffing compliment and was treated as a learner/observer and this was a break from the more traditional apprenticeship model.

Subsequently, EEC Directive, 89/595 of the E.U meant that an extra twelve weeks theoretical instruction was to be included bringing the total to 40 weeks of theory or one third of the programme and clinical instruction to one half of the minimum 4,600 hours required.

1990’s-Constructing the future of nursing
As the twentieth century moved into its last decade it had become inevitable that the education of nurses would transfer to university level. The notion had been around for at least thirty years. The demands of therapy grew, the acceptance of a holistic view of the individual’s ailments, scientific and technological advances, the shift from institutional to community care, all required new knowledge and skills. Tradition, sentiment and economic reasons could no longer be valid excuses for retaining the old order of things. It is considered that members of the nursing profession in the future will be required to possess increased flexibility and the ability to work autonomously. The future health service will also require greater inter-disciplinary co-operation in the delivery of Health Care.
In 1994 a pilot registration/diploma course was introduced at University College Galway following an arrangement with the Western Health Board. This led to the establishment of a centralised applications system involving the Western Health Board and the Department of Health. By 1998 similar training arrangements had been implemented for all schools of nursing and a revised centralised system, the Nursing Applications Centre was introduced with the participation of the Department of Health, the Local Appointments Commission and Price Waterhouse, the management consultants. The comprehensive report of the Commission on Nursing (Government of Ireland, 1998) pushed the development a stage further by calling for the creation of a four year degree programme of pre-registration nursing education at degree level in all third level institutions. The National Implementation Committee was established by the Minister for Health and Children in January 2000 and charged with the responsibility for overseeing the implementation of the pre-registration nursing degree programme in time for 2002. Consequently, the pre-registration nursing degree programme commenced in higher education institutes in partnership with affiliated health service agencies around the country in September 2002. In addition the Central Applications Office, which processes other student applications for third level education, has taken over the application system for all pre-registration nursing education.

During the 1990’s an important change also took place in the long standing provision for the training of nurses for the care of sick children. There were three schools offering training for direct entry to the sick childrens’ nurse register. In the 1990’s it was decided to terminate the programmes. The decision to discontinue the three years direct entry training programme arose largely from the expanding skills and knowledge expected of all nurses and from the difficulties in securing employment by persons who had been trained only in children’s nursing. The three year course was replaced by a shorter post-registration course and became the only manner in which a nurse could obtain a formal qualification in sick children’s nursing.

A reorientation of health service policy came into being in 1994 with the publication of Shaping a Healthier Future (Department of Health, 1994a). This document brought a strong commitment to the concepts of primary Health Care and health promotion. It followed two earlier documents advocating a similar approach (Department of Health, 1986b) Health Education Bureau, 1987) and was in response to the World Health Organisation Strategy. Cowman (1990a) describes how a cross section of Irish nurses gave a positive and constructive response to this initial W.H.O strategy of Health for all. The Department of Health has continued to work in this policy area (Department of Health 1995a; 1996 a, c, d, f; Nutrition Advisory Group 1995). An Bord Altranais (1994a) recommended that primary Health Care should become an essential feature of nursing curricula and that future programmes should provide nurses with knowledge and expertise in community nursing.

The E.U Advisory Committee on Training in Nursing highlighted the need for continuing education. During the 1990’s Ireland took measures to address this issue.
Acknowledging the role of continuing education for nurses in advancing practice and preventing obsolescence (An Bord Altranais, 1994a) a report was undertaken to examine the situation and recommend proposals for the future (An Bord Altranais, 1997a).

The consultative process of the Commission on Nursing (1998) also identified an increasing demand for and proliferation of post-registration (continuing) education for the profession. Following the Commission’s recommendations a National Council for the Professional Development of Nursing and Midwifery (the National Council) was established in November 1999. The purpose of the National Council is to give guidance and direction in relation to the development of specialist nursing and midwifery posts and post-registration educational programmes offered to nurses and midwives. The Council administers its own budget. A large component of the work of the National Council involves bringing a coherent approach to the progression of specialisation and the development of a clinical career pathway for nursing and midwifery. In order to gain the necessary qualifications to practice as a specialist nurse, postgraduate diploma courses are now available in areas such as gerontology, coronary care, intensive care, peri-operative care, paediatric nursing, and accident and emergency nursing (to name but a few) in 3rd level institutions in the Republic of Ireland.

In addition, the absence of a clinical career pathway in nursing and midwifery was seen as increasingly limiting the development of the profession. The Commission recommended the development of a three-step clinical career pathway by the creation of clinical nurse or midwife specialist (CNS) posts and advanced nurse or midwife practitioner (ANP) posts. Those with CNS or ANP status ought to be characterised by extensive relevant experience, appropriate post-registration educational qualifications and an extended scope of practice. The Third Annual Progress Report of the Monitoring Committee of the Implementation of Recommendations of the Commission on Nursing (Government of Ireland, 2002a) indicates that the National Council approved a large number of clinical nurse/midwife specialist positions in 2002.

2000-Present - New horizons of professionalism?
There are currently 13 institutions in the Republic of Ireland that offer a degree in General Nursing. This four-year full-time course involves the study of theoretical and practice-based subjects. It involves classroom teaching and taught placements in a variety of clinical and non-clinical settings. According to the Athlone Institute of Technology website (http://www.ait.ie/courses/bscnursinggen.shtml) each student of general nursing undergoes a total of 80 weeks clinical study and 68 weeks theoretical study. This constitutes an increase of 28 weeks of theory as compared to the previous model of nurse education.

The concepts and principles of health, humanism, adult education and lifelong learning are evident in the BSc Nursing programme aims. In general terms, the most obvious difference between the degree programme and the previous model is the balance of theory and practice. Accordingly, there is a greater emphasis
on the development of knowledge for practice (‘nursing science’) as opposed to practice based on routine and ritual.

The overall scope of nursing and midwifery practice in Ireland has traditionally been defined by legislation, national and local policy and guidance. An individual nurse or midwife’s scope of practice has been defined by the registration education that she/he has received. Additional skills have been attained by participation in education programmes for which they have received certification. It became increasingly clear that this is neither an efficient or effective way of developing the competence of the nursing and midwifery professions in the interests of quality patient care. ABA recognised that nurses and midwives need to be able to develop their professional practice in a way that is flexible and responsive to patient and service need. Thus The Scope of Nursing and Midwifery Practice Framework was published in April 2000. This framework provides a consideration of the principles that should underpin decisions about the scope of nursing and midwifery practice.

In their report, the Commission on Nursing attached particular importance to the development of nursing and midwifery research at every level: within each individual organisation (hospital or community), at health board level and within the Department of Health and Children. The Commission asserted that research should form an integral part of all aspects of nursing and midwifery if nursing and midwifery practice is to be evidence based. Accordingly, the Minister for Health and Children provided a dedicated budget to the Health Research Board for nursing and midwifery research. In addition, in 2002, a Research Development Officer was jointly appointed by the National Council and the Health Research Board.

Similarly, it was recommended that a nursing and midwifery research advisory division should be established within the Health Research Board. The Research Strategy for Nursing and Midwifery was launched by the Minister for Health and Children in January 2003. The Research committee meets quarterly. It is the committee’s responsibility to agree a project plan for implementation with the joint appointed Research and Development Officer of the Health Research Board and the National Council for the Professional Development of Nursing and Midwifery.

There is currently a crisis in terms of staffing levels of nurses. Irish nurses seek better career opportunities and renumeration in the U.S and the Middle East in particular. Cognisant of the fact that accelerated levels of nurse migration may be a symptom of systemic problems in the nursing workforce, the Minister for Health and Children, in 2000 launched the ‘Nursing and Midwifery Recruitment and Retention Initiative’. The initiative is designed to attract qualified nurses and midwives currently not working back into the public health service, retain nurses and midwives in the public health service and address the need for more trained nurses in specialist areas.

The extension of the Work Visa/Work Authorisation Scheme is another government response to the nursing staff shortage. This scheme facilitates the fast-track recruitment of skilled Health and Social Care Professionals from
overseas. It allows Public Health employers to undertake concerted overseas recruitment campaigns that can make a significant contribution to addressing shortages of key personnel (such as nurses) in the Public Health Service.

**Recent Trends in restructuring in Nursing in Ireland**

**Decentralisation**
There is evidence of decentralisation with respect to assessment in nurse education programmes. Prior to the 1980’s The Nursing Board set State exams. Two examinations were obligatory for registration as a qualified nurse. Part 1 registration occurred after 12 months of the programme and consisted of a written examination. The registration examination after 3 years consisted of written and oral examinations.

Continuous assessment of clinical skills was undertaken throughout the three years using An Bord Altranais (Irish Nursing Board) Proficiency Assessment Forms and a minimum of seven satisfactory forms from six week clinical placements were required for registration. From the early 1980’s onwards, the theoretical assessment procedure for registration changed. Part 1 registration examination was replaced with three knowledge assessments over the first 12 months. These were set by the individual schools of nursing (rather than the Nursing Board) and marked by the Staff. The oral examinations in the registration examination were discontinued. Since the introduction of the degree programme in 2002, exams continue to be set by the individual schools/faculties of nursing. However, An Bord Altranias does issue guidelines regarding the curriculum content of the course (ABA, 2002).

There is some evidence of regionalization of decision making. The establishment of the Nursing and Midwifery Planning and Development Units has responsibility at a regional level.

**Privatisation/Marketisation**
Marketisation in Health Care is continuing with increasing numbers of patients going privately for operations and taking out private health insurance.

The marketisation of the health service is evident in terms of the increase in hospital productivity. According to an OECD (1997) report hospital productivity as measured by bed occupancy and average length of stay has improved. This suggests a possible increase in nurses’ workload in general hospitals.

The marketisation of Health Care has influenced the repositioning of professional boundaries for nurses. Historically role extension for the nurse has occurred with the offloading of medical tasks to nurses (transferring appropriate medical duties to nurses is more cost-effective than employing more doctors.) Another consequence of privatisation and marketisation in Health Care is that there is a trend towards upskilling and the introduction of specialties. Nurses are improving their knowledge and hence their marketability. This enables them to
find a niche and thereby give them a degree of control so that they can influence their terms of employment.

**Gender**
Demographic and social trends may influence nurses and the people who choose nursing as a career. McCarthy (1988) found that the majority of candidates for nursing were young, single women with an overrepresentation from middle class and farming backgrounds.

**Extended roles/ Positionality (relation with doctors and health care assistants)**
There is evidence in the Irish context of the role of nurses being extended and eroded. Similarly, the position and authority of nurses is in transition.

The Health Service Executive (HSE) has threatened to withhold a 3.5% pay increase for nurses next month because it claims they are refusing to support the introduction of Health Care assistants in hospitals. Health Care assistants would perform duties such as taking a patient's temperature and blood pressure. However, their relationship to nurses has not been agreed. The Irish Nurses Organisation (INO) says there are professional, ethical and legal issues to be clarified about this new grade of staff. The motion will open the prospect of industrial action while it indicates also that traditional roles and their boundaries are being eroded and re-negotiated.

In Ireland there has been a growth in the availability of paramedical services including dietetics, occupational therapy, physiotherapy and psychology. Department of Health Manpower statistics (1995 as cited in Condell, 1998) also show increasing employment in the paramedical division. This growth may impinge on the role of the nurse resulting in role erosion. It is suggested that responsibilities for areas of patient care such as diet, mobilization and counselling may now in some instances, be the domain of other paramedical professions and not nurses. Sheehan et al. (1994 as cited in Condell, 1998) describes the establishment of a multi-disciplinary pain clinic with input from physiotherapy, occupational therapy, social work and psychology but not nursing. Tensions and conflicts may also occur within such multi-disciplinary teams (Hendriks, 1983 as cited in Condell, 1998) especially when roles are not clearly defined.

Historically role extension for the nurse has occurred with the offloading of medical tasks to nurses. The situation continues to the present day, as a recent discussion document shows, whereby it is envisaged that appropriate medical duties would be transferred to nursing and other staff in order to solve medical manpower issues (Department of Health, Comhairle na n-ospideal, Postgraduate Medical and Dental Board, 1993). An example of such role extension is the issue of intravenous drug administration (O’Sullivan, 1984; Department of Health, 1996b as cited in Condell, 1998), with the inclusion of educational preparation for nurses for this role since 1984 (An Bord Altranais, 1983).

Harrington et al. (1995), in a study examining the types of general practice employing practice nurses found practice nurses undertaking basic treatment room tasks, practice organisation tasks and what was viewed as extended tasks...
such as counselling for obesity, cholesterol, smoking, psychological health and enuresis; women’s health issues including cervical screening, breast examination, family planning and antenatal care; and management of diabetes and hypertension. Recognition that the expanding role may cause role conflict was acknowledged by the authors (Harrington et al, 1994) as was the possible use of employing a practice nurse in lieu of a female general practitioner (Harrington et al, 1995). Role conflict may also be the root cause of an agreement between the health boards and the Irish College of General Practitioners forbidding domiciliary care by practice nurses (Department of Health and Children, 1997d as cited in Condell, 1998).

Since the 1980’s there has been an increased emphasis on family care (Cronin 1995b) with the expectation that parents and siblings become fully involved in the care of the ill child or infant. This means a change in the role for the sick children’s nurse with far greater educational and counselling skills required.

Midwives have extended their role also. Depending on individual hospital policies, midwives in the past twenty years may have undertaken obstetric tasks such as artificial rupture of membranes, perineal suturing and intubation of the newborn, thus extending their role.

The scope of practice framework will allow nurses and midwives to expand the parameters of their role in a dynamic way. The framework aims to support and promote best practice for all nurses and midwives which will ensure the protection of the public and the timely delivery of quality Health Care in Ireland.

Secularisation
The social trend of increasing secularisation is a phenomenon within Irish society. According to An Bord Altranais (2000) the radical reduction in recent decades of the large numbers of religious involved in nursing has been a social loss that has removed from the caring services a large body of individuals who brought special qualities of dedication to their work. Due to the historically large contribution of the religious to Irish nursing (McCarthy, 1986, Scanlan, 1991 as cited in Condell, 1998) the fall off in vocations since the late 1960’s (Nic Ghiolla Phdairg, 1995 as cited in Condell, 1998) will reduce the influence of the church on nursing both at a macro and a micro level. It might be suggested that the reducing role of the religious orders in education (Nic Ghiolla Phdairg 1995) may also have some implications on traditional career selection patterns.

IT/technology
Advances in technology and treatments have impacted on the role and practice of the nurse. For example with technology, paediatric nurses have written about the effects of computerisation on their practice (Connolly, 1988). McCarthy (McCarthy, T, 1996, as cited in Condell, 1998) examined how demographic trends and technological advances have impacted on the case mix of one paediatric hospital. There was evidence that procedures in Cardio-thoracic surgery increased in number and complexity. The paper did not address the implications of such changes on the nurses’ role.
Many changes have occurred which impact on the hospital midwife. An increase in demand and availability of epidural analgesia as a means of pain relief in labour has impacted on the midwives practice and role. Epidural use has reduced the labouring woman’s sensation and mobility with resultant potential problems requiring prevention. Maintenance of the epidural infusion, whilst remaining the responsibility of the doctor, is in fact undertaken by the midwife (An Bord Altranais, 1994c as cited in Condell, 1998).

Advances in fertility treatments (Fawzy et al 1996) have increased the rate of multiple births with sequelae of prematurity and other problems. Advances in technology and treatment have resulted in greater survival rates with viability occurring at earlier gestational age (Clarke, 1995, as cited in Condell, 1998). This has implications for midwives professional knowledge and skills in the area of neonatal intensive care.

There is also evidence of nurse teachers assessing computer packages as learning tools (Creedon, 1997; Harvey, 1988) and syllabi (O’Connell and Redmond 1988). An Bord Altranais have an e learning zone on their website in order to support a standard through interactive learning.

**Europeanisation**

Since Ireland’s entry to the EEC in 1973, nurses like many other occupational groups, became subject to the European Union’s directives. The discussions on working out a mutually acceptable policy on general nursing went on for several years. Two general nursing directives, 77/452/EEC and 77/453/EC were eventually approved by the Council and became subject to implementation by member countries in 1979. The directives aimed to provide mutual recognition of the formal qualifications of general nurses. They required the extension of general nurse training into obstetrics, paediatrics, geriatrics, psychiatry and community care.

The E.U Advisory Committee on Training in Nursing published guidelines III/D/5044/1/89-EN which focused on measures to reduce the theory practice gap in general nursing. Actions suggested included eliminating students as employees and granting them full student status, designing andrological nurse programmes which incorporated self-directed components with the use of technology, and the use of continuing education and vocational updating. Ireland has implemented these recommendations through the introduction of the degree programme and the establishment of a council for professional development of nursing and midwifery.

The European Union’s directive of January, 1980 laid down the conditions for the mutual recognition of training and formal qualifications of midwifery. In summary the directive required full time training in midwifery for three years, or two years for a person who already had a formal qualification as a general nurse or eighteen months for a person with a formal qualification as a general nurse followed by a year of professional practice.

In the period following the Commission on Nursing there is less influence from Europe, the focus is more on regional and national agendas.
Decline/emergence of Unions
For decades nurses, encouraged by their employers, distanced themselves from active trade union membership as antipathetic to the profession of nursing. Until recent times many nurses were not members of unions; many others although in membership, were lukewarm when it came to adopting union stances (ABA, 2000). That situation has now changed radically. In October 1999, when the unions representing the profession called an all-out strike in support of a demand for better conditions, the nurses responded almost unanimously. The Irish Nurses Organisation (INO) has changed status from that of a professional body to that of a professional trade union affiliated to the Irish Congress of Trade Unions and thereby joining other trade unions with nurse memberships. The literature does not contain an analysis of how trade union membership may affect the professional role. However, it is definitely the case in the Irish context and since this transition, nurses have become more assertive and militant, voting for strike action on a number of occasions in recent years, securing a major pay rise in the process.

Supply
Nurses have become by far the largest professional group working within the public health services. During 1996, when there were 65,755 persons (whole time equivalents) employed in these services, 27,264 of them were nurses (ABA 2000). Despite that situation in the booming economic climate in prevailing in Ireland in 2000, some health service managements were having great difficulty in filling vacancies for nurses. It has been necessary to meet the shortfall by securing the services of foreign nurses. In a speech by the Minister for Health and Children in November 2000 he stated that:

"The most recent survey of nursing vacancies undertaken by the HSEA revealed a total of 1,388 vacancies nationwide. Of the 64,000 nurses and midwives on the An Bord Altranais nursing register almost 11,000 are inactive. If even 10% of those on this register were to be attracted back to the workforce as a result of more flexible working arrangements this would go a significant way towards eliminating the present shortage".  

Migration
According to a study by Buchan and Sochalski (2004), Ireland’s level of reliance on international sources has risen rapidly since the mid-1990’s. In Ireland the relative importance of nurses from non-Irish backgrounds has risen to the extent that in 2001 about two-thirds of new entrants to the Irish nursing register were from other European Union and international sources. The principal sources of nurses for Ireland were Australia, India, the Philippines, South Africa, and the United Kingdom.

Implications for Nurses in Ireland

The profession
Nursing may not be universally accepted as a profession in its own right. However, in many respects nurses meet with Brante’s (2005) requirements for membership of the ‘professional’ category. Nurses receive formal education and
training in skills in higher education; professional competence is guaranteed by the use of university examinations; nurses have a code of ethics to guarantee professional integrity; the practice of professional services is frequently in the common interest; they have a professional organisation (An Bord Altranais) to monitor practice; and they share common values as evidenced by definition of nursing (see ABA, 2000a)

According to An Bord Altranais (2000) the improvements in education and in the quality and broadening skills of nursing in general have not only enhanced its status within the caring professions but have also increased the self esteem of nurses.

**Professional Knowledge**

Nurse education has undoubtedly become more academicised. According to ABA (2000) the professional knowledge and the skills of nurses and midwives have expanded enormously. They attribute the production of a group of high quality professionals meeting the requirements of a very advanced health service to the changes that have taken place in nursing practice and training.

The Scope of Nursing and Midwifery Practice Framework (ABA, 2000a) specifies what it means to be a competent nurse/midwife.

“To be competent, it is not enough to be able to fulfil a specific role or function or even to be able to practice at a specific level of skill. A competent professional nurse or midwife possesses many attributes. These include practical and technical skills, communication and interpersonal skills, organisational and managerial skills, the ability to practice safely and effectively utilising evidence, the ability to adopt a problem solving approach to care utilising critical thinking, the ability to perform as part of a multidisciplinary team demonstrating a professional attitude, accepting responsibility and being accountable for one’s practice.”


According to ABA (2000a) the purpose of the pre-registration degree course is to ensure that the student is equipped with the knowledge and skills necessary to practice as a competent and professional nurse. Professional knowledge of nurses appears to consist of achieving competence in the following domains of practice: Professional / ethical practice, Holistic approaches to care and the integration of knowledge, Interpersonal relationships, Organisation and management of care, and Personal and professional development.

**Professionalisation**

It is difficult to ascertain to what extent nurses have gained status and resources for themselves. Nurses have continued to pursue professionalisation through moves towards nurse education that is undertaken to degree level in higher education institutions. They have become more militant and taken strike action to secure a major pay rise. The Commission on Nursing (1998) enabled nurses to improve their career prospects through the introduction of advanced
practitioner and specialist positions. The Scope of Nursing and Midwifery Practice Framework aims to facilitate nurses in defining their role and in identifying professional development needs.

However, these improvements don’t appear to be sufficient to retain nurses. Health service managements continue to have great difficulty in filling vacancies for nurses. As already mentioned, of the 64,000 nurses and midwives on the An Bord Altranais nursing register almost 11,000 are inactive. The general impression (anecdotally and from observation) is that the number of mature nurses in public hospitals has declined at a time when 60% of women are members of the workforce. With the growth in the private sector and private Health Care there is also evidence of nurses migrating to the private sector.

However, the Irish Health Service is in turmoil and transition. How the public sector reform plays out will be crucial in shaping the future of nurses. Reforms will have a particular impact on the status of nurses and the capacity of the health service to retain valued members. The Department of Health and Children currently have a Working Group on Recruitment and Retention of Nursing Staff in the Dublin Area. It is difficult to predict the outcome of Nurses’ status (particularly the effect of the degree on their status) until someone undertakes research in the Irish context. There is currently no Journal of Irish Nursing.

**Professional Autonomy**
The nursing profession has become more assertive and independent in attitude and is now moving towards acceptance as an autonomous profession, rather than continuing to be perceived as a subordinate appendage to the medical profession. ABA (2000) cites the development of independent nurse specialists as evidence of this increasing autonomy.

In recent decades the profession has been involved to an increasing degree in the policy and decision making machinery of the health services. Nursing representatives have been elected by their colleagues to local health boards since their establishment in 1970 but given the size of the board and their strong political orientation and priorities it has been difficult for the small nursing voice to be heard.

At the central level, nurse participation over the years in many commissions and working parties relating to the health services established by the Department of Health (and Children) provided a more effective input into policy decisions. But for many years there was only one nurse adviser in the Department of Health.

The Introduction of the Scope of Nursing and Midwifery Practice Framework will provide nurses and midwives with a basis for the review of current scope of practice. This will assist in the identification of the professional development needs of nurses and midwives and serve as a basis for service evaluation and definition of roles.

**Professional Identity**
Nurses’ professional identity is shaped in part by circumstances. Internationally
they have a reputation as being caring and competent professionals and are even headhunted for positions in the Middle East and the United States.

In sum, nursing emerges at the end of the century as a hugely enhanced activity, larger in numbers, greater in skill, an essential element in the great volume of social provision for the sick and the infirm. Some would feel that the sense of vocation has diminished. In any event for most of the century the notion of vocation was cynically exploited by those in authority as a justification for not giving nurses just recompense for their services (ABA, 2000). But whatever the inspiration nursing remained an extremely popular choice of career. According to ABA (2000) even if the sense of vocation is less apparent and if the traditional ways of recruiting and training have become facts of history, there is no evidence that the quality of commitment of the profession to its caring role has diminished.
Chapter 8

Education and Health Care Restructuring in England and Implications for Teachers and Nurses and their Professional Knowledge

Caroline Norrie and Ivor Goodson

This review was carried out using the BNI (British Nursing Index) NMAP (Nursing and Midwifery and Allied Health Resources - UK), Pubmed, Ingenta and the British Education Index (BEI) as well as ERIC and Web of Science. Restructuring in Education in England will be explored first and then Health Care restructuring.

Education

Educational restructuring in England can be seen as following the following periodisation:

- **1945-1975** – The consensus years – progressivism and expansion
- **1976-1995** – The Conservative years and the Educational Market

**1945-1975: The consensus years – progressivism and expansion**

The history of the English Education System is extensively covered in the literature; two popular and useful books (Gordon *et al.*, 1991, Aldrich, 1982) cover the long historical period. One of the most important Acts of Parliament which shaped the English education this century was *The Balfour Act* (1902) which established Local Educational Authorities (LEAs) and gave these bodies powers over secondary and higher education. The next defining Act was *The Butler Act* (1944) which established a Ministry of Education and set up a tripartite system of secondary schools. In practice, the third category of school the Technical school did not develop and English schools became divided into two types - Grammar Schools for those who passed an exam at aged 11 or 12 and Secondary Modern schools for the rest.

The 1960 – 75 era is remembered as a time of progressivism and expansion in English education when teachers were trusted as ‘rational autonomous agents’.

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57 In England the Economic and Social Research Council, (ESRC), a government funded quango is a major body in charge of distributing funds for research. Under New Labour the ESRC has provided money for a *Teaching and Learning Research Programme (TLRP)* which is probably the largest amount of spending on educational research ever in England. However this funding has been restructured. In the past, researchers in universities had ideas for projects and applied for funds from government organisations. Today, themes to be studied are decided by the funding body and universities have to bid on these topics. Copywrite of the research produced is now owned jointly by the university and the ESRC, and research is required to be archived nationally. Funding for nursing research can be applied for from more disparate sources such as numerous government and charitable bodies or hospital Trusts.
and were free to experiment with child-centred learning in the prevailing culture of permissivism and egalitarianism and this was reflected in the research produced in this era. The agreement between Labour and Conservative politicians over policy means these years are also sometime known as the ‘consensus years,’ although many: for example, Rhodes in (Ferrera et al., 2002) state this was a myth. It was during this period that the meritocratic ideal of the common or comprehensive school was introduced due to popular demand as Grammar schools were seen to be elitist and Secondary Modern schools were seen to have low standards. Difficulties in amalgamations of schools are described by Hargreaves (1982). Labour failed to compel LEAs to comprehensively during this period and as England’s economic performance declined, criticisms of progressive education increased and so in 1976 Labour announced a dramatic turn about and a halt in comprehensivisation. By 1976, selection still existed wholly or partially in more than half of LEAs. Details of salary negotiations, government pay polices, strikes and arbitration in these years can be followed in Gosden (1972) and Roy (1983).

Teacher training in the post-war period took place in teacher training colleges. However, the Robbins report of 1963 suggested that training colleges should become part of the higher education system and from 1965 universities began offering 3 year courses and post-graduate one year courses - an all-graduate profession was heralded. The ‘craft-based knowledge’ (Brown and McIntyre, 1993) of the teacher training colleges with their disciplines of educational culture changed in the move over to universities. Emphasis in universities was placed on the disciplines of sociology, psychology, philosophy, sociology and history – teaching and learning were undermined as a focus for study. Changing Philosophies of Teacher Education and the role of Higher Education by Elliott (2002) examines the changes in ethos in teacher training in the last 45 years.

1975-1995: The Conservative years and the Educational Market
The election of Margaret Thatcher in 1979 brought Neo-Liberal policies and quasi-markets to Education in England. The ideological agenda of the Conservatives was the supremacy of economic goals of society, especially the over-riding concern for England’s economic position in the global market and education was to be restructured with teaching as a ‘standards driven’ profession (Elliott, 2002). This new agenda was not introduced without a fight by teachers and the furor is reflected in large amount of critical literature available.

A major act of the Thatcher years was The Baker Act (1988) which introduced the controversial National Curriculum with testing and achievement targets for pupils at ages 7, 11 and 14. It included the right for schools to ‘opt out’ of the LEA system if the majority of parents voted by secret ballot. These schools were known as grant-maintained schools as they received a grant directly from central government depending on how many pupils they could attract - in effect they were businesses funded from central government. Financial management of schools was taken away from LEAs who were deemed inefficient and given to boards of school governors.
Of great interest to teachers was the creation of the Office for Standards in Education (OFSTED) – a quango which employs private contractors to inspect teachers and schools and to ‘name and shame’ failing schools. This was seen by many as attacking the authority and professionalism of teachers who were no longer trusted to behave professionally without supervision. The concept of City Technology schools, partly funded by the private sponsorship was introduced. The popular Inner London Education Authority (ILEA) was dismantled, due to its left-wing political stance, despite having parental support. The interplay between the National Curriculum and decision makers can be found in Goodson, (1993) or Lawton (1993). Goodson also notes that the imposition of a new centralised national curriculum could be seen as a national building device to help revive a floundering national identity (Goodson, 1990).

The main thrust of these changes, which have been extensively documented and analysed, was to introduce market forces (supply, demand, competition and choice) into all levels of the educational system. Aldrich and Leighton (1985) discuss why this act was felt to be needed, while Maclure (1988) analyses the effects and Lawton and Chitty (1988) criticise the act. By more heavily assessing schools and publishing the results of assessments in league tables, the conservatives believed they would instil competitiveness into schools and enable parents and students to make informed choices. Useful articles on the relationship between teachers and the state are found in Lawn and Grace (1987). The 1988 Act also abolished the national teacher negotiating machinery. Under the 1991 School Teachers’ Pay and Conditions Act, the Secretary of State for Education and Skills, now determines teachers’ pay and conditions of service issues such as working time, without negotiation.

Attempts to reform higher education were also embarked on by the Conservatives with the establishment of the Research Evaluation Exercise (RAE) in 1986 which has influenced the production of academic research. University departments are graded according to the amount and ‘quality’ of their research output and government funding is allocated on the basis of this. The pressure on academics to publish research is controversial especially in vocational departments where this may not have been seen as a core task in the past.

Teacher training was reformed during the 1980’s with theoretical learning being attacked as irrelevant and there was a ‘back to schools’ movement. The emphasis in teacher education shifted to the production of behaviours or competences that complied with requirements of the National Curriculum. Universities found themselves on the receiving end of list of things teachers needed to be able to do if they are to competently deliver the National Curriculum. Initial teacher training was made subject to government inspection and a council for accreditation of teacher education was established (CATE). In 1993 the Teacher Training Agency (TTA) was created and OFSTED inspections of teacher training courses was introduced. If courses received poor marks in their OFSTED reports, funding was reduced. In-service training was brought under central control by specific-grants given to schools not universities. Shortages in teacher supply led to a scheme where untrained and unqualified staff were introduced into classrooms from 1989. Graduates were trained on the
job by teachers, and licensed after 2 years, representing a fundamental retreat from the concept of an all trained profession.

Typical of literature at the time, Andy Hargreaves, (1994:6) summarised, “The British case of multiple, mandated change is perhaps an extreme one. It is extreme in its frantic pace, in the immense scope of its influence and in the wide sweep of its legislative power. More than anything it is extreme in the disrespect and disregard that reformers have shown for teachers themselves. In the political rush to bring about reform, teachers’ voices have been largely neglected, their opinions overridden and their concerns dismissed.”

Some teachers would argue this still sums up the situation today.

When Labour came to power in 1997, their election pledge was ‘Education, education, education’. However, eight years on there is great debate in the literature about the extent to which Labour policies can be seen as a break with, a continuation or even an extension of what the conservatives started. There is also confusion and debate in the literature about the significance or superficiality of New Labour restructuring measures, their often contradictory nature and their implications for the teaching profession. However, unlike in the 1980’s, when academics collectively resisted Thatcherite reforms, in their writing, the discourse has been less critical of New Labour reforms.

Maguire examines restructuring and concludes “Under New Labour – the project of restructuring the teacher was to continue – only now the project was located in a new discursive formulation – the need to modernize the teacher” (Maguire, 2004).

West and Pennel (2002) argue that on issues of parental choice, admissions, school diversity, funding and testing “the Labour Government can be seen as having embraced the quasi-market with a similar enthusiasm to that of its Conservative predecessors although it has tended to emphasise social inclusion as opposed to competition. While it has attempted to soften the edges of the quasi-market it has not tackled some of its major deficiencies such as the power that schools that are their own admission authorities have to distort the admissions process.” Mahony and Hexhall (2000) emphasise Labour has continued the conservative theme of seeing education policy as one element of economic policy. Whatever the answer to this argument, there is no doubt Labour has brought in a plethora of ‘fast policy’ changes for teachers – that are churned out so quickly it is difficult for people to keep up with them.

This restructuring started as soon as New Labour came to power with the 1998 School Standards and Framework Act. This act reorganised the categories of mainstream maintained school into three: Community Schools replaced county schools; Foundation Schools replaced GM schools and Voluntary Aided Schools remained the same. This re-naming also included new ‘fair-funding’ arrangements for schools and is examined by Andersen (2001). The 1988 Act also set limits for infant class sizes and enabled LEAs and the Secretary of State
to intervene in schools judged to be ‘failing’ by OFSTED - such schools would be given 2 years to improve or they would be closed.

New Labour has introduced ambitious targets for every LEA school in England. Rhetoric focuses on excellence, quality and a culture of auditing. A standards agenda designed to drive up levels of attainment across the system and create minimum standards below which no school will fall, has been the driving force behind change. A culture of auditing means creation of targets and tiers; set syllabuses, the introduction of key stages for age groups and benchmarking, creating a large amount of extra bureaucracy for teachers. *OFSTED, Inspection and the Betrayal of Democracy* (Fielding, 2001) is one example of the large body of literature criticising OFSTED, excessive testing and its effects on the moral of pupils and staff. While in *Target Setting, Policy Pathology and Student Perspectives: learning to labour in hard times*, Fielding (1999) explores the issue and decryes the ‘idolatry of measurement’.

As part of an effort to tackle deprivation, the 1998 Act introduced *Education Action Zones* (EAZs) - clusters of schools in deprived areas working together, with government grants and sponsorship from local businesses and assuming some of the functions of the LEA. The initiative and ‘the spin’ around it is discussed in greater detail by Gerwitz et al. (2004). EAZs were succeeded by *Excellence in Cities* - which operated with LEAs as the direct funding of EAZs had proved to be expensive.

Initiatives to encourage schools to work together have been introduced by Labour. *The Beacon schools* initiative was introduced in 1998 to raise standards through the dissemination of good practice. 1,150 Beacon schools across England were identified as being amongst the best performing schools in the country representing examples of successful practice that could be shared with others. The Beacon initiative is due to be phased out by 2005 and replaced by the *Leading Edge Programme*, which strengthens the sharing of good practice and collaborative working between schools.

In 1998 the *Teaching and Higher Education Act* established the General Teaching Council (GTC) and the first Council began its work in 2000 with the registration of all teachers. Pressure for a General Teaching Council dates back to the nineteenth century. The GTC's role is to regulate the conduct and competence of teachers in the public interest. Some see it as fulfilling the long-held aspiration of teachers to have the same status as other self-regulating professions. The GTC may decide to issue a reprimand, suspend, restrict or ban a teacher where the safety and welfare of children is at risk, or public confidence in the profession would be compromised. The 1998 Act also abolished student maintenance grants and required students to contribute towards their tuition fees while at university.

Schools in difficult circumstances have been targeted with several initiatives. For example, various failing Local Authority services have been put out to tender (Hackney and Islington in London) and even schools have been handed over to private companies. Kings Manor School in Guildford was the first (Gillard, 2004). 1999 saw the start of the ‘*Fresh Start*’ scheme where so called...
‘superheads’ were appointed to revitalise ‘failing’ inner-city comprehensive schools. Playing for Success (PfS) established in 1997 by the DfES in partnership with the Football Association Premier League, the Nationwide League, their clubs and Local Education Authorities (LEAs) has set up out of school hours study support centres within top football clubs to help motivate certain pupils with literacy, numeracy and ICT.

Whitty (1998) noted that the growing influence of commercial organisations as consultants in public provision can contribute to a change in the ethos of a school. He suggests that some aspects of marketisation contribute to privatisation in an ideological if not a strictly economic sense and sees a process of ‘creeping privatisation’ in education.

In Labour’s second term the 2002 Education Act allowed successful primary schools to opt out of the National Curriculum and encouraged more involvement of the private sector in state provision. It also brought in more Specialist schools. These were announced by Prime Minister, Tony Blair who stated hundreds of comprehensives would be turned into ‘specialist schools’ – consigning the comprehensive system – the egalitarian dream of the 1960’s to history. This act also continued the City Academy Schools programme where schools are sponsored by private funding. Labour insist that the days of the ‘one-size fits all’ comprehensives are over. The Labour politicians’ mantra ‘standards not structures’ is a sound-bite that summarises their focus on raising standards, testing and league tables rather than being concerned about what type of school children attend. Diversity of school type is seen as positive and that includes selective schools. A controversial clause in allows religious groups to take control of more state schools, for example a £12 million Islamic secondary school for girls in Birmingham and a Christian evangelical school in Leeds (Gillard, 2004).

Yeomans (2000) examines the Specialist Schools programme and notes the intrinsic contradiction in asking secondary schools to collaborate in networks when they operate in a context where they are also in competition with each other for pupils and therefore funding. Labour policy of diversity of provision of education is attacked as in reality this is choice for parents to choose a school for their child (usually based on the wealth and wisdom of parents rather than any ability or effort of the child). Many commentators see that this open enrolment advantages middle class children due to their greater levels of cultural capital (Bourdieu, 1992).

In Market Frustration? Admission Appeals in the UK education market (Taylor et al., 2002) look how parents are increasingly exercising their right to choose the school for their child. They say this is possibly leading to a move from an ‘established’ market to a more ‘heated market’ with hotspots of frustration and expensive appeals from parents.

The most recent Labour White paper - Education and Skills aims to re-structure vocational training, rationalising the 3,500 vocational qualifications currently available and introducing 14 specialised diplomas covering a broad range of sectors and skills. This paper was accompanied by media discussion that this
was a missed opportunity to bring in Baccalaureate style diplomas to replace GCSEs, with the aim of harmonising qualifications with Europe.

Workforce Remodelling has been introduced by new labour, following a report by Management Consultants PricewaterhouseCoopers in March 2001 commissioned by the DfES (PricewaterhouseCoopers, 2001). Findings concluded that teachers were working excessively long hours. The DfES website about Remodelling states,

“By restructuring the teaching profession and reforming the school workforce, we can reduce teacher workload, raise standards, increase job satisfaction and improve the status of the profession.” (Department of Education and Skills)

As an acceptance that restructuring changes meant more work for teachers, from 2003, administrative and clerical tasks were to be transferred from teachers to appropriate support staff and new grade of Higher Level Teaching Assistants were introduced to help create reasonable work/life balance for teachers. Examples of tasks not to be undertaken by teachers from include, “Collecting money, Investigating absences, Processing exam results, Managing pupil data and Inputting pupil data” (Department of Education and Skills) (http://www.teachernet.gov.uk/wholeschool/remodelling/). Many teachers see this as a break from the past as there are also clauses that mean the taking away of the pastoral care element of their job which for many is seen as rewarding and crucial to their professionalism. Increased plans for extended school hours and childrens’ centres mean introducing more non-teachers into schools. When this is combined with the already increasing roles of SEN teachers, counsellors, teaching assistants (TAs) and business managers, it can be seen that this has implications for the positionality of teachers.

In Classroom Assistance (Horne, 2001) examines the Labour initiative of introducing untrained classroom assistants as teachers’ aides. Horne asks if this is the creation of a two-tier teaching profession in England? The National Foundation for Educational Research (NFER) review of literature (Lee, 2002) on the impact of teaching assistants in schools has shown that they are playing increasingly significant roles in supporting teachers and pupils and the pattern of a teacher accompanied by one or more teaching assistants working with individuals, groups and classes of pupils has become commonplace, especially in primary schools. However, researchers found that this is not necessarily leading to any reduction in teacher workload, or creating extra time for them to concentrate on planning or preparation. Instead it means teachers have the extra responsibilities of managing another adult, in addition to the class.

Labour has announced the Building for Schools (BfS) as the biggest ever school buildings investment programme. The aim is to rebuild or renew nearly every secondary school in England over a 10-15 year period, beginning in 2005-06. Many of these projects will be funded by the controversial and widely criticised Private Finance Initiative (PFI) where private sector organisations build and own a school and then lease it back to the government over 30 years. However there is widespread criticism of how these schemes will work, for example Edwards
and Shaoul (2002) examine one case in London and cast doubt on the regulatory control of the project, particularly in terms of meeting the identified needs of the school, ensuring value for money and affordability. The article considers the suitability of the PFI method and the process to appraise PFI schools projects, where the interests and different responsibilities of the local education authority and school governors may conflict.

Fitz and Beers (2002) describe and compare the privatisation of education in the USA and Britain, covering vouchers, contracting out, Public-Private Partnerships, take-overs, tax credits, compulsory competitive tendering (CCT) of services and Private Finance Initiatives. The company CfBT is one of the biggest not-for-profit companies in the England with a turn over of £64 million and interests in managing one school in Islington, administration of the national literacy and numeracy strategies and the national system to introduce performance related pay, as well as international interests. The article concludes that well-publicised failures to deliver the promised better education at cheaper cost or raise pupil performance means that although privatisation is becoming big business it is still in its infancy in both countries.

From September 2005 young people staying on at school or college have become entitled to Education and Maintenance Allowance (EMA), and could earn up to £30 a week on an 'earn as you learn' basis.

Under the 2002 Education Act around 1000 schools were given the freedom to change teachers’ pay and conditions. Hill (2005) states this de-regulation undermines nationally agreed pay and conditions and results in a general worsening in conditions for the many: for example the use of temporary contracts without job-security and the exploitation of part-time (often women) workers and teaching assistants. Pay is forced down, apart from the few who receive performance related pay enhancements, based on pupil examination results. Farrell and Morris’ (2004) research finds performance related pay has been greeted with ‘resigned compliance’ by teachers. Critical analysis literature of New Labour policies are produced by the Hillcole Group (Allen et al., http://www.tpress.free-online.co.uk/Hillcole.html).

Rikowski sees that in England there is currently a ‘hidden’ pre-privatisation of state schools by enabling schools to function as ‘little businesses’ through business-like management and the ability, within the 2002 Education Act, for schools to act as capitalist enterprises and merge and engage in take-overs of other schools. City Academies, specialist schools, school companies, the ‘Excellence in Cities’ programme, Private Finance Initiative (PFI) for school funding, outsourcing of school meals, the Education Action Zones policy and the payment of teachers by pupil results can all be seen as various forms of making a profit out of education (Rikowski, 2005 (forthcoming)). Green’s The Privatization of State Education (2005) examines the increasingly complex, deregulated role of the private sector in education provision.

Since New Labour has been in power, they have introduced a new reward and grading system into teaching and improved pay. Administration of the scheme has been given to a private company. Those who pass a threshold competence
assessment can earn up to £31 000 without management responsibilities. Threshold pay schemes of England and Scotland are compared in by Menter et al. (2004) with the conclusion that in Scotland the money has been linked to extra training whereas in England, pay bonuses have been given out fairly freely. Fast-track career progression has been introduced for teachers entering the profession with good qualifications. A new grade of teacher has been introduced - the Advanced Skills Teacher who can earn up to £45 000.

Teacher Training
The conservative policy of allowing graduates with no teaching qualifications to become qualified on the job has been extended with the ‘Teach First’ scheme in London and Manchester due to the crisis in teacher recruitment. The TTA also introduced a new idea of funding teacher training through a consortium of schools rather than by HE so the School Centred Initial Teacher Training (SCITT) initiative means schools can group together to rival universities in offering teacher training.

Maguire (2002) examines in Globalisation, Education Policy and the Teacher how training has been reformed so that much more time is spent in the classroom (24 weeks out of 36 for secondary teachers) doing teaching practice rather than at university with a loss of university and college influence. She describes how professional horizons have been narrowed so improving delivery is the only desired outcome of professional training rather than theorising, which some see as de-intellectualising. There is increasing localization and utilitarian nature of in-service and pre-service training. She writes New Labour’s overly deterministic view of globalisation is a major factor guiding their education policy – ensuring UK plc is competitive in the global economy.

Many investigations of motivations for entering teaching have been commissioned, including by the TTA. A systematic literature review of research about recruitment to initial teacher training has recently been published by the National Foundation for Educational Research (Edmonds et al., 2002). Bringing together findings from a wide range of research studies, it concluded that trainee teachers choose teaching largely for intrinsic reasons: working with children; intellectual fulfilment; making a contribution to society. Teaching is believed to offer job security and intellectual challenge, both considered by appropriately qualified young people to be important factors in making career choices. The aspects of teaching that deter young people from considering it as a career are low pay, excessive paperwork and dealing with disruptive pupils (Haydn et al., 2001).

The Teaching Profession and their Professional Knowledge

Current Issues in Teaching
Teacher stress, burn out and staff shortages are a feature of the professional discourse in England. Jarvis (2002) presents an international literature review of teacher burn-out and stress. He states that teacher stress is a much talked of phenomenon, however there is little consensus regarding its aetiology, or how to tackle it. He focuses on England and notes that one of the dominant representations of teaching has become that of a highly stressful occupation. In
notes a survey of head teachers by the National Association of Head Teachers (NAHT) in May 2000, 40% of respondents reported having visited their doctor with a stress-related problem in the previous year, 15% believed they were alcoholics and 25% suffered from serious stress related health problems. Government research has also found that teachers and nurses were the occupations with the highest levels of stress (Heath and Safety Executive, 2003/2004).

Information on teacher shortages in England can be found in Smithers and Robinson (2000). Think-tank DEMOS’ report concludes that the teaching recruitment and retention problem in England is long-term not cyclical and this has a bad effect on morale of staff, while wastage is a huge problem and that half of newly qualified teachers will leave teaching within 5 years (Horne, 2001).

The feminisation of the profession is seen as a problem in England and discussed and written about extensively in the literature, for example an empirical analysis of the situation by Hutchings (2002) and a qualitative study of early years male teachers by Burn (2005) which covers negative stereotyping and the moral panic surrounding paedophilia and the effects this has on male recruitment.

The Teaching Profession
Think-tank, Demos (2001) notes there is a generational divide in the professional identity of teachers, based on how they respond to change. Younger teachers are more interested in learning outcomes – the end result of teaching, than they are with ideological or historical arguments about the processes by which these outcomes are achieved. Demos finds an increasing division among more experienced teachers between “energy creators” who try to subvert prescribed orthodoxy to meet more demanding and valuable goals and a disillusioned group.

“Experienced teachers have either become fatalistic about change in education or remain committed to teaching and prioritise improvements in working conditions over pay. In contrast, younger teachers, who are more instrumental and flexible in outlook are increasingly concerned about their pay and prospects as well as their opportunities for autonomy.” (Horne, 2001:10)

However without some professionals having enthusiastically embraced the new managerial opportunities and pushed through reforms they could not have occurred. Goodson (2003) sees older generations of teachers as being autonomous whereas the new professionals are ‘technically competent’, comply with guidelines and directives and are therefore ‘deliverers’. He sees teachers being socialised into a professional community that is increasingly dictated to by central government and has identified a ‘crisis of positionality’, where personal visions of change are pre-empted by external interest groups.

“Personal visions of change have been substantially pre-empted by external interest groups. Internal change agents now find themselves responding to changes, not initiating them. In this crisis of positionality instead of being committed to internal change agents (with personal
visions and ideals in harmony with the changes being sought) people become conservative respondents to, and open opponents of, externally initiated change.” (Goodson, 2003:90)

**Professionalisation**

Historical analyses of the concept of professionalisation (Goodson and Hargreaves, 1996, Lawn, 1996, Ozga, 1981) reveal the extent to which definitions of teacher professionalism are situational, relational and often contradictory. Lawn (1996) analyses the professionalism in the immediate post Second World War period and compares it with the notion of professionalism at the end of the 20th century. Lawn writes that the period between the 1920s and 1990’s constituted a distinct, modern period in education during which school systems were developed, a trainee teaching force was established and foundations were laid for the welfare state. Particular concepts of professionalism, public service and progress buttressed this modern vision, defining teachers’ professional identities and controlling their work. This project collapsed in the 80s. The macro, grand narrative of modernising mass education gave way to the paradigm of globalisation and ‘the micro’ or ‘the local’. Teacher professionalism was at this point redefined as a form of competent, multi-skilled, flexible labour practises operating within a regulated curriculum and internal assessment system.

Hoyle (2001) examines *Teaching - prestige, Status and Esteem* and notes how in England the Office of National Statistics, have redesigned their occupational brackets promoting teachers who now fall into the same bracket as doctors and solicitors, with only ‘Higher Management Occupations’ above them. However he writes about the positionality of teachers – being seen as ‘not in the real world’ and concludes teachers should abandon the chimera of professional status and take a more political stance to work with parents themselves to improve education. He also questions how status differs for teachers across Europe and between secondary and primary education.

Troman (1996) also sees primary teachers as divided between old professionals and new professionals who accept new political guidelines. He believes that teachers are still, however semi-autonomous.

Goodson (2003) compares *classical professionalism* (academicisation) with *practical professionalism* (the market replaces academic obfuscation as the route to professionalisation and teachers give up powers of definition and autocracy, but are rewarded in the market with financial incentives, bonuses and payment by results for selected leaders and managers.)

**Professional Knowledge**

Goodson (2003) describes how professional knowledge is lost in the restructuring process, especially when experienced teachers are forced to take early retirement, leaving younger teachers to struggle on in a community without elders. He identifies ‘institutional memory loss’ and ‘mentoring loss’ and the effect this has on recruitment and retention.
ITC is increasingly an important part of teachers’ knowledge. In Pedagogy, information and communication technology and teachers’ professional knowledge, Leach (2000) explores the New Labour governmental policy imperatives to apply new forms of information and communications technology (ICT) to school improvement especially with reference to the National Curriculum. The analysis juxtaposes the piecemeal, random way in which ICT is used in National Curriculum programmes of study and schemes of work with the government rhetoric that requires coherent planning and integration of ICT within all aspects of teaching learning. The article argues that this contradiction within the policy process could be overcome if a stronger conceptualisation of teachers' professional knowledge was embraced. An example of such a conceptualization is presented and this is exemplified by accounts of teachers' development of ICT within their pedagogic practice.

Elliot (2002) describes how teachers’ subject experience becomes redefined in terms of economically functional knowledge. The ‘New Professionalism’ is defined not by knowledge of a subject of ‘disciplines of education’ or theoretical knowledge about the aim of education; but how to comply with the standards of functional competence as defined by the state.
Health Care Restructuring in England

Restructuring of the health system in England has been divided into 4 distinct periodicities by Powell (2000). These are, 1) central command and control, 2) the restructured NHS of the 1980’s, 3) the NHS market of the 1990’s and 4) New Labour and the new NHS. However, restructuring of Health Care can also be seen as following the same periodisation as that of the restructuring of the English education system and will be examined according to these time periods in this paper.

1945-1975: Bureaucratic control and the nurse apprentice system

In comparison with the vast literature on the history of teaching and education, there is less available on nursing. Abel-Smith’s (1975) A History of the Nursing Profession, was the first major contribution to British nursing history which came from ‘outside’ the profession. It includes information about Nurse Florence Nightingale, her experiences in the Crimean War, and her subsequent reforming of English nurse training using a military model which influenced the nursing ethos until recent years. An Introduction to the Social History of Nursing is another well-known book (Dingwall et al., 1988). The role of gender in the development of nursing as a profession is also examined in the literature by for example by Witz (1992) and Evans (2004).

The history of the National Health Service (NHS) in England is well covered in the literature for example Klein (2001), Webster (1998), Baggot (2003) and Bradshaw and Bradshaw (2004). The NHS came into being in 1948 with the principle that treatment is free at the point of delivery to all citizens of the UK according to their needs. The cost is met through taxes, National Insurance contributions and flat rate charges for prescriptions (unless exempt). From 1948, to its first reorganisation in 1974, the NHS was administered in three parts: hospital and specialist services, general practitioners and local authority health services. In 1974, a major reorganisation took place, the objective of which was to bring together the three services into an integrated system for planning and delivering Health Care.

Nurse training during this period was carried out in Schools of Nursing attached to hospitals, where the idea of vocation was central. Bradshaw (2001) outlines very clearly the apprenticeship style of the national system of nurse training at this time. She identifies four key principles of nursing: 1) the development of moral character; 2) the building up of technical knowledge, practical skills, routines and procedures; 3) the authority, influence and supervision of the ward sister and 4) the induction into professional etiquette of ‘right relationships’. There was a 2 or 3 year, two tier system in place with training leading to either enrolled or registered nurse status.

1976-1995: The Restructured NHS and the Health care market – Nurses move into universities

In 1979, a radical Conservative government was elected with Margaret Thatcher at the helm and a commitment to ‘roll back the frontiers of the State’.

Complaints about the standard of service in the NHS in the early 1980’s led the Secretary of State for Health to ask Roy Griffiths (then General Manager of...
Sainsbury’s – one of the biggest food retailers in the UK) to undertake a total review of NHS management and to make recommendations for change. His recommendations for consensus management teams to be removed and replaced by General Managers on contracts and incentive pay were implemented. This ended the bureaucratic-consensus management of the NHS, with its generous arrangements for representing the professional views. The success of managers’ influence over nurses and para-medical activities has not been duplicated with doctors. Laundry, portering, catering and cleaning services were contracted out in 1984 using compulsory competitive tendering, in the name of greater efficiency. These were areas that nurses had previously been able to control.

In early 1988 intense publicity was given to problems such as shortages of beds and the high wastage rate of qualified nurses, which led to long waiting lists for planned surgery. Thatcher announced she would oversee a complete review of the NHS which resulted in the National Health Service and Community Care Act 1990. Before this Act a monolithic bureaucracy ran all aspects of the NHS. After the establishment of the internal market, ‘purchasers’ (health authorities and some family doctors) were given budgets to buy Health Care from ‘providers’ (acute hospitals, organisations providing care for the mentally ill, people with learning disabilities and the elderly and ambulance services). To become a provider in the internal market, health organisations became NHS Trusts, independent organisations with their own management, competing with each other. The first wave of 57 NHS Trust came into being in 1991. By 1995, all health care was provided by NHS Trusts. This idea was taken from American health economist Alan Enthoven. It was argued this restructuring would lead to greater competition and an improved service. GP’s who opted into this system were called ‘GP fund-holders’ and were created amidst controversy about whether this would create a 2 tier system with queue jumping. No moves were made to totally privatise the NHS apart from dentists and opticians services.

Developments in the final years of the conservatives under Prime Minister John Major included government initiatives which laid down the rights of patients in a Citizen’s Charter, including the introduction of maximum waiting times for treatment and the named nurse initiative.

A major change that was symbolically important and can be seen as the beginning of a trend that has escalated in the following years was the introduction by The Department of Health of tables comparing the performance of different Heath Trusts, for example their waiting times. This increased patient expectations and awareness of their health care provision.

In 1988, clinical grading for nurses was introduced aiming to offer a career structure that rewarded nurses for their level of responsibility and clinical skills. Previously, the only way nurses could progress further up the ladder was to move into management or teaching. Half a million jobs had to be graded in 6 months.

Nurse training was also to be restructured. The apprentice approach had been increasingly criticised for its emphasis on the acquisition of practical skills at the expense of academic content and because students were frequently exploited, in
fact receiving very little direction or support from experienced practitioners while carrying a heavy burden of responsibility (Lindop, 1999). The new scheme for nurse education was introduced by the United Kingdom Central Council for Nursing Midwifery and Health Visiting (UKCC) in 1989 – it was known as Project 2000. Nurse training was totally changed. *The Project 2000 Nurse*, (Bradshaw, 2001) evaluates the justifications for and effects of changing over from the old system to the new method of training.

The old schools of nursing were amalgamated into universities in the early 1990’s. Project 2000 courses were of 3 years duration. Two schemes operated. The first pathway resulted in the award of a degree in addition to registration. Students enrolled for three years full-time and must pay living costs. The second pathway leads to a Diploma and registration (although they may later take a ‘top-up’ course leading to a degree level qualification). Diploma students received a bursary during training which was more generous than the financial support received by degree students. (This has now been changed and degree students also get a bursary). Students take a common foundation programme lasting 18 months, followed by 18 months further in a specific branch of nursing (adults, children, people with a learning disability/handicapped or mental health). The leaders of the nursing profession had sought to redefine nursing as a profession of autonomous practitioners. Nurse students were assigned to individual trained nurses when they came to the wards in a supernumerary capacity and the learning experience was unstructured. Ward routines were discarded in favour of flexibility and the individual nurse was personally responsible and accountable for his or her own practice. Professional etiquette was replaced by values of independence. Nurses were to be patient advocates rather than doctors’ helpers. The relationship of subordination to medicine was no longer seen as in the patients’ best interests. Feminism made the relationship between doctors and nurses offensive to some.

In project 2000 greater emphasis was placed on holistic care, which is individually planned to meet the physical, emotional and social needs of the whole person, whether in hospital or the community. Health promotion was also focused on as primary care becomes increasingly important. Project 2000 aimed to provide a nursing workforce of 'knowledgeable doers' better equipped to respond to the complex demands of a changing Health Care system (UKCC 1986).

However, the changes in nurse education had unintended consequences. Nursing students used to make up a significant number of junior staff on the wards. Taking students off the wards meant a loss of labour. Shortages had to be filled and a new post of Health Care Assistant (HCA) was introduced (Buchan 1992). Mayne (2004) examines how before, nursing students could be exploited but now they complained of lack of supervision, learning opportunities to gain practical knowledge and so reduced confidence. HCAs at this time were seen as having poor training prospects, few opportunities for career development, low pay and their roles were poorly defined, with overlaps in responsibility with qualified nurses (Thornley, 1997).
Nurses have traditionally taken over doctors' jobs as medicine has become increasingly technical. In the early 1990’s, boundaries became increasingly blurred and a 1992 document *Scope of Professional Practice* (UKCC, 1992) allowed nurses to adapt their roles and take on new responsibilities as long as they were deemed competent. Nurses came to take over many roles formerly undertaken by doctors and GPs. The Nurse Prescribing Act was passed in 1992, to allow nurses prescribing facilities.

Witz (1992) sees the nursing profession as having adopted a *dual-closure* strategy comprising of *exclusion* (moving into universities) and *usurpation* (extending their role to take over jobs previously done by doctors) in their aim to improve status. This strategy emphasises a scientific approach to nursing knowledge, focusing upon research, evidence-based practice and high-quality training.

Bradshaw (2001) explores the different ethos of training that have affected nurse education. She describes 1981-1986 as the period of the autonomous practitioner, 1985-1999 where nurse education was dominated by demonstration of competencies; 1990-1999 the new professionhood of extended roles and from 1994 there have been concerns over quality of nursing care and nurse shortages.

1995-2005 – New Labour Modernisation – are nurses ‘too posh to wash and too clever to care’?

New Labour came to power in 1997 with the rhetoric of the *Third Way* (Giddens, 1988) and pledging to abolish the internal market in the NHS. The new approach in the NHS was to be ‘based on partnership and driven by performance’. Labour have attempted to modernise the NHS and have introduced a huge series of initiatives, financial and organisational changes and alterations in policy which influence the work context of nurses. Labour had committed itself to the national spending plans of their predecessors for their first two years in power but since then substantial amounts of money have flowed into the NHS. Literature analysing New Labour health care restructuring is extensive for example Glendinning (2002) Powell (2002) or Baggott (2003). An Independent Charity *The King’s Fund*, analyses government progress in the NHS. Their report (2005) audits New Labour’s efforts from 1997 – 2005 in meeting their own targets and concludes that in many areas services have improved.

When they took power, Labour rhetoric rejected the internal market. In reality however, Labour left much of the architecture of the internal market in place - Trusts and Health Authorities remained and providing and purchasing Health Care continued to be subject to contracts between them. GP fundholding however was abolished and replaced by Primary Care Groups (PCGs) covering localities of about 100 000 people, who would now commission community and hospital services. From 2000, PCGs were encouraged to progress towards independent Primary Care Trust status (PCTs). These Trusts are managed by Management Boards of nurses, Health Authority members and executive officers and social services personnel but GPs have lobbied to ensure they dominate them. By 2002, PCTs were established throughout the NHS. By giving GPs and patients purchasing power in the NHS it is hoped consumer choice will force
up standards. PCTs have brought together groups of practices and taken a more collective approach to commissioning services. Labour have reduced the number of Health Authorities from 95 to 28 and Regional Health Authorities have been replaced by 4 Directorates of health and Social Care.

Labour introduced two new quangos - the National Institute for Clinical Evidence (NICE) to assess the costs of new medical interventions and treatments and decide if they are financially worthwhile providing for patients and an independent inspectorate - CHI - later to become the Health Care Commission to assess the performance of individual NHS institutions and aware star ratings so the public can see if they are served by a 3* or 0* (failing) Trust.

An NHS plan has been drawn up with a newly established Modernisation Agency. It developed National Service Frameworks to identify key interventions for services or care groups and a 10 year plan was announced in 2000. Labour has continued setting targets for the NHS in a bid to reduce waiting times for patients, for example patients should only wait for 4 hours in A&E and 24 hours to see their GP. In 1999 Labour produced tables ranking Trusts by performance, based on operative mortality and re-admission rates. These were criticised for being crude and have since been modified and extended with targets set for reducing certain areas for example cancer care, heart disease and mental health. There is a huge emphasis on target setting and auditing, with associated increases in bureaucracy and paperwork for nurses as is described by Warne and McAndrew (2004). Market ideology has brought emphasis on service as well as on public health, primary care and evidence-based medicine. Patients are offered a choice of the hospital at which they will receive their treatment.

The Private Finance Initiative scheme (PFI) was introduced into the NHS to build 15 new acute hospitals. Under PFI, a private sector consortium pays for a new hospital. The local NHS trust pays the consortium a regular fee for the use of the hospital, which covers construction costs, the rent of the building, the cost of support services and the risks transferred to the private sector. This means that most new NHS hospitals will be designed, built, owned and run by a consortium or grouping of companies. The NHS will employ some of the staff - mainly doctors and nurses - and will rent the building and other facilities from the consortium for at least 25 years. So PFI hospitals will be a new context for nurses to practice in. The appeal of PFI for the government is that the cost of the hospital does not appear as an immediate lump sum payment in public expenditure. Unions and many other commentators criticise PFI hospitals as being more expensive to run and privatisation by the back door (Gaffney et al., 1999).

Another radical new initiative is the introduction of Foundation Trusts in 2002; hospitals judged to be performing well by the government are given more freedom, legitimised by stating they will have closer community links. Wilmott (2004) examines the policy and concludes that the blueprint of the foundation hospital creates a set of relationships which are incoherent and mutually conflicting, and conceals a crucial relationship with the state.
Pay and conditions of NHS workers have also being restructured under New Labour. *Agenda for Change* was implemented in the NHS, across the UK on 1 December 2004. It was the biggest overhaul of NHS-wide pay, terms and conditions in over 50 years and aims to pay staff based on the skills, knowledge and competencies with jobs designed around patients’ needs, rather than prescriptive grades. It is hoped this will create a flexible, more efficient workforce.

The government has recently announced that it plans to increase the use of the private sector (to reach 15%) in its provision of healthcare, with implications for the positionality of nurses. Plans include using spare capacity of private hospitals, use of overseas clinical teams for some services with long waiting times such as cataracts operations and new public/private partnerships for rapid diagnostics.

Nurse training is controversial in England and complaints about the declining quality of nurses is a theme found in the literature. Since the introduction of the Project 2000 training in the 1990’s, gradually concern began to be expressed about nurses’ practical skills. There was a problem for newly trained nurses on the wards to know if they were competent or not with no nationally set syllabus or set of procedures. By the late 1990’s, it was clear that there were some fundamental problems with Project 2000, in providing the professional knowledge that would make newly trained nurses competent. Labour announced they were going to reform nurse education. A Health Act was introduced in 1999 which enshrined for the first time the duties of care and the quality which were now to be monitored by the Commission for Health Improvement (CHI) who would set and monitor standards in the wards.

Uppton (1999) examined the tension between the so-called ‘theory-practice gap’ and asked - *How can we achieve evidence-based practice if we have a theory-practice gap in nursing today?* He examines how the move into higher education had broken links with hospitals to the detriment of students. Courses were seen as too academic and students were criticised as lacking practical skills. A ‘new model of nurse education’ was piloted in September 2000 at 16 sites, focusing on the development of practical skills earlier on in training, better clinical placements, with better support from trained nurses with good teaching skills and from nurse teachers who practice nursing. In the autumn of 2002, it was confirmed that Project 2000 was to be phased out of all training organisations by the autumn of 2002, however there is still no core curriculum in the new courses.

In 2000 the government listed 10 areas of potential responsibility that nurses could be taking responsibility for, including ordering diagnostic tests, making and receiving referrals, admitting and discharging certain patients, managing a caseload, running clinics, prescribing treatments, carrying out resuscitation procedures, performing minor surgery, triage and running of local health services.

The government also decided that the privilege of self-regulation should end for nurses. The UKCC had no powers to deal with professional incompetence (only
with professional misconduct) so nurses were seen by the government to be unaccountable. The Nursing Council which was formerly run by nurses was forced to accept lay members. The UKCC introduced a requirement that nurses had to re-register every three years and in order to do so they had to demonstrate they had carried out some professional development. Then in April 2000 the government decided that the UKCC would be replaced by a new Nursing and Midwifery Council (NMC). The English National Board was also abolished and its quality assurance function was taken over by the new NMC. The NMC is responsible for maintaining a live register of nurses, midwives and specialist community public health nurses. The NMC has the power to remove or caution any practitioner who is found guilty of professional misconduct. In rare cases (e.g. practitioners charged with serious crimes) it can also suspend a registrant while the case is under investigation. The creation of this body is seen as introducing greater surveillance of nurses and taking away their professional autonomy. External lay membership of the nursing body was seen as necessary for the profession to be accountable and do its job of protecting the public.

The Nursing Profession and Professional knowledge

**Current Issues in Nursing**

Nurse burn out is a current discourse in the literature. Sheward (2005) et al found that increasing ratios of numbers of patients to nurses was associated with increasing risk of emotional exhaustion and dissatisfaction with current job. Rowe and Sherlock (2005) explore types and frequency of verbal abuse of nurses by other nurses. They found nurses who experience occupational burnout are more likely to abuse other nurses. Respondents reported that the most frequent source of abuse was nurses (27%), followed by patients’ families (25%), doctors (22%), patients (17%), residents (4%), other (3%) and interns (2%). Of those who selected a nurse as the most frequent source, staff nurses were reported to be the most frequent nursing source (80%) followed by nurse managers (20%). They concluded that verbal abuse in nursing is quite costly to the individual nurses, the hospitals and the patients. Nurses who regularly experience verbal abuse may be more stressed, may feel less satisfied with their jobs, may miss more work and may provide a substandard quality of care to patients. Winstanley and Whittington (2004) examine the variation in aggression towards Health Care staff in a UK general hospital among professions and departments.

The role of the nurse is being extended due to costs and the reduction of doctors’ hours since the 1989 EU Working Time Directive forcing nurses to take over more of the tasks previously undertaken by doctors. Stubbings and Scott (2004) analyse the literature on extended roles, for example Clinical Nurse Specialists and Nurse Practitioners were created in 1992 and Nurse Consultants were established in 2000) and the implications of the changes in the NHS, ramifications for multi-professional working practices, patient care and delivery of health services. They note there are increasing numbers of doctors whilst the qualified nurse ratio has declined. Meanwhile there are proposals for nurses to extend their roles further and the removal of professional restrictions.
Adams (2000) *et al.* describe how nurses are now encouraged to be multi-skilled – to enhance patients’ experience of ‘seemless’ care. They state this approach is seen to incorporate both post-Fordist and Taylorist elements. They find that human resource management (HRM) strategies designed to achieve staff flexibility undermine the distinctive domains of professional work and create ‘fuzzy’ boundaries and nursing work is growing indistinguishable from other health care professions. However, they simultaneously enhance nurses’s status as they undertake more medical work. Findings also highlight the lack of an explicit professionalisation strategy within nursing itself and lack of clarity about advanced practice.

Many of the core skills of nursing now being undertaken by health care assistants (Daykin and Clarke, 2000, McKenna *et al.*, 2004). The pressure to reduce costs means in many health care services there is an increase in unqualified staff. To compensate for these changes in the qualified nurse’s role, Health Care Assistants are now undertaking National Vocational Qualifications up to level 3 to bridge the gap in care delivery left by registered nurses (Iley, 2004). But many nurses feel dissatisfied as they are taken away from caring. HCAs represent the most rapidly growing group within the NHS. According to the Royal College of Nursing (Buchan and Seccombe, 2003) the number of HCAs demonstrated a 46% increase between 1999-2002. This is a matter of concern in the light of emerging research evidence to suggest that quality of patient care is improved with lower rates of morbidity and mortality in hospitals which employ a high proportion of qualified nurses (Aitken and Patrician, 2000).

Staff shortages are a feature of nursing in England. Despite strategies to retain staff such as ‘grow your own’ schemes, and efforts to attract back those who have left the profession, most publicity and literature is devoted to nurse immigration into England. Literature on nurse movement into England covers what nationalities are coming and in what numbers (Buchan, 2004, Buchan and Delanyo, 2004, Buchan and Sochalski, 2004, Stilwell *et al.*, 2004). Buchan notes, cross national comparisons can be unreliable due to different statistical methods of data collection (Buchan, 2004). By 2001-2002, for the first time there were more overseas nurses added to the nurse register than home nurses in the UK. It is estimated that 16.4% of qualified nursing, midwifery and health visiting staff are from ethnic minority groups (Buchan *et al.*, 2003). Gerrish writes about issues when *Nursing in a multi-ethnic society* (Gerrish *et al.*, 1996).

### The Nursing Profession

Nurses can be seen to be going through a difficult period in England, berated by the media for being ‘too posh to wash’ and ‘too clever to care’, and allowing filthy wards to harbour the super-bug MRSA, they are also under pressure from staff shortages and rapid changes with no consensus about their professional identity or professional mission. Shanley (2004) explores the (re)introduction of the role of ‘modern matron’ as a response to public complaints about quality of care and ward cleanliness.

In England, the notion of ‘profession’ in nursing is controversial. *Nursing is not a profession* by Sleicher (1981) expresses a typical view that nursing lacks a
A Literature Review of Welfare State Restructuring in Education and Health in European Contexts: Implications for the Professions and Professional Knowledge

body of knowledge, levels of education, extensive autonomy and the notion of service falls short, so cannot be termed a profession.

Discussion of nursing’s gendered identity and how nursing skills are seen as natural female attributes rather than competencies that are developed through professional education are analysed (for example, Evans, 1997, Salvage, 1985, Witz, 1992). Witz describes how these factors have contributed to the occupational position of nursing as well as considering how doctors use occupational closure to retain their hegemony in Health Care.

There are now over 200 different allied health occupations and a plethora of clinical nurse specialities e.g. haematology nurse, ICU specialist or stoma nurse. To cope with treating the patient as a whole in this web of medical specialisms, the nurse training now emphasises team working skills and multi-disciplinary team working, but this does not diminish the hierarchical nature of the environment. Baggot (2003) describes the different models for power-relations between doctors and nurses that have been presented. For example

1) Subservience model (Friedson, 1988),
2) the doctor-nurse game: Nurses are influential but hide their power in a show of subservience in front of patients (Mackay, 1993).
3) Opportunistic Model: Nurses take opportunities offered by particular situations to exert direct influence over patients (Hughes, 1988).
4) Negotiated Order: Nurses have resources which they may use to influence decisions. They use knowledge of the patient for example to negotiate openly over boundaries of work (Svensson, 1996).
5) Informal power model: Nurses exercise independent judgement and work beyond their formal boundaries in order to maintain the continuity of care which is accepted by doctors on practical grounds (Allen, 1997).
6) Nursing power model: Nurses are given the freedom to make decisions about care and to evaluate the outcomes without medical ‘interference’, for example as Nurse Consultants.

There is literature that states that the marketisation of health care means that whereas nurses were once able to think of themselves as people with a vocational service, they are now having to think in terms of nursing labour (Hunt and Wainwright, 1994, Bradshaw, 2001).

**Nurse Professionalisation**
The extent to which nurses should professionalise is an area of great contention, Salvage (1985) sees attempts to raise standards of education and professionalise as simply a way for a few highly technical staff to improve their status, pay and conditions at the expense of the many. In trying to achieve a professional identity, nurses have been faced with problems such as image, nature of the work and how this is viewed in society (Salvage, 1985).

Nelson and Gordon (2004) argue that nursing is consistently presented as a practice without a history, constantly reinventing itself within new professional and technical realms. This raises recurrent problems in the construction of nursing's contemporary professional identity and search for social legitimacy. Constituting new nursing knowledge and practice as discontinuous with the past
produces a sense of historical dislocation of nursing knowledge and practice that, reproduces the need for reinvention. This "rhetoric of rupture," arises from nursing's frustrated attempts to gain social status and legitimacy. Paradoxically, this constant reinvention in fact hampers nurses' attempts to gain that status and legitimacy.

Davies (1995) puts forward the idea there is an alternative path for nurses seeking status for nursing and emphasises the professional knowledge of caring skills, team and service work. Davies restates Waerness’s point that caring values are lost once they are incorporated into formal education because the emphasis is on gaining scientific knowledge. Waerness argues that science is embedded in masculine thinking and that, because of its gendered nature caring cannot attain worth (Waerness, 1992). Parkin (1995) has suggested that the drive for conformity with other professions and professional status is incompatible with nursing and the push for superior knowledge hampers the ability of nurses to interact with patients. Nurses need a substantial knowledge base, but this should be balanced by the ability to perform the practical side of nursing. Nurses have continued to pursue professionalisation through moves towards nurse education that is undertaken in higher education institutions and the establishment of one level of qualified nurse (to replace the enrolled nurse). Previously, having two levels of qualified nurse in England had been seen as problematic for health service managers and nurses themselves, and the ending of enrolled nurse programmes in 1992 helped solve this problem (Webb, 2000, Iley, 2004). However, this has only created a new situation with the growth of Health Care Assistants (Clark and Booth, 2000).

**Nursing and Professional Knowledge**

Beach (2003) gives a good overview of literature on professional knowledge in Nursing in England. Schon (1987) voiced the common criticism, still being negotiated today that nursing knowledge is too academic, too exclusive and is too closely allied to medicine. Gerrish *et al.* (1997) identify 3 types of nursing knowledge; ‘propositional’ which is taught in the classroom, ‘practice’ knowledge and ‘experiential’ knowledge.’ They suggest that pre-registration nursing does not focus enough on experiential knowledge. At the root of this issue is the lack of a ‘scientific’ body of professional knowledge that holds back nurses in their efforts to professionalise, in the medical-discourse dominated environment. This means that nurses have traditionally been keen to undertake technical medical tasks, despite the fact they help to obscure the value of traditional nursing care skills. Others have focussed on professional knowledge as caring – an altruistic activity which emotionally benefits nurses and those they care for (Woodward, 1997).

Debates about the implications of technology on nurses and their knowledge and power are a feature of the literature. For example, Maddox (2004) examines how self-informed consumers in the UK are changing the dynamics of the patient-health care provider relationship as well as how health services are accessed. Clients can purchase health-related products over the internet and self-medicate. They can also communicate with providers more easily, participate in patient-initiated communities or virtual self-empowering self-help groups.
Equal access to medical knowledge however is an issue. There are now calls for professions to include e-health in their ethical codes.

Hart et al. (2004) review literature on ICT in health care and found in their study of 47 patients, the Internet has is seen as symbolic but actually contributes to subtle rather than dramatic changes in the relationship between health care practitioners and patients. Consultations are not dramatically different since the arrival of the Internet as trust in practitioners remains high and consultations are so time-pressured. The introduction of NHS Direct (a telephone helpline staffed by nurses) can be seen as using technology to improve services. Sundin (2003) applies the theory of professions within his research on nurses’ information behaviour, and thereby shows how the “relevance” of information and information “needs” are defined in competition between, or within, different professional domains.
Chapter 9

Summary

The first section of this summary aims to describe the different national periodisations of welfare state restructuring as they have been presented in the literature. The second section examines to what extent generations can be identified in the literature of each ProfKnow country. The third section examines commonalities and differences in restructuring in the literature in the different national contexts. Finally, the literature on the effects of restructuring on professions and their professional knowledge will be discussed.

This summary is derived from the national literature reviews and readers should be reminded that the content comes from the original chapters. The following diagram will be used as an aid to organising and conceptualising the huge amount of data collected.

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The aim of the further work packages (WP 3, 4 and 5) in the ProfKnow project is to carry out surveys and interviews with teachers and nurses belonging to different generations and attempt to understand how their professional personas and positionality have changed over time and so elicit information about how restructuring has affected them. Consequently, it is necessary to compare the literature about the periodisations in the ProfKnow countries and identify the different generations of teachers and nurses.

**Periodisation**

There are clear differences in the literature representing the varied trajectories of the Northern countries in the ProfKnow consortium (Finland and Sweden) and the Southern countries (Spain, Portugal and Greece). Meanwhile, the literature from England and Ireland appears to demonstrate they are following their own more idiosyncratic patterns.

It is important to note that these national trajectories influence the production of research. Frameworks for knowledge production are socially constructed and there are different traditions between the ProfKnow states and “findings” are relative to the conceptual or methodological structure used at the time. For example, this literature review is funded by the EU with extra costs made up by individual consortium members’ universities and can be seen to be fitting into an EU agenda. In the Northern European countries and England, there is a longer
history of research production compared to the Southern European countries whose research in the recent past has been stifled by their political systems. In Finland research on nursing and teaching is wide-ranging and the Finnish review focuses mainly on publications that are either doctoral dissertations or results produced in research projects. Likewise in the Swedish report. Literature on restructuring in Ireland is scarce due to lack of government funding and the recentness of changes. In contrast, in England, restructuring and literature on it has been extensive since the 1980’s.

The Literature review from Finland quoted Antikainen (2005) who describes how Finland was drawn into the capitalist world at the end of the 19th century due to its forest resources which were required for paper production, but even until the late 1960’s it was a more agrarian and less industrialised economy than other western European countries. Between 1960 and 1975 Finnish society underwent one of the fastest economic modernisations in Europe, to become an industrial, Nordic welfare state and the education system was crucial in the rural to city migration of many citizens. Antikainen (1981, 1985) examines how in education, since the late 1960’s the idea of a comprehensive education system has been the major rationale behind Finnish education policy. The late 1960’s and 1970’s were characterised as the flowering of ‘planning romanticism’ in Finland but in the 1980’s a marked change occurred and an incremental planning paradigm gained ground and decentralisation was implemented. There was greater pursuit of economic growth, reliance on market forces and greater emphasis on professionalism in education and health care. Schools became more responsible for their own management and were supposed to design their own curricula according to the guidelines given by the national board of education. In the 1990’s there has been a trend towards school-based profiles, stronger parental choice, and ‘customer’ orientation and, in particular a systematic school evaluation system. Antikainen (2005) writes that the consequences of these more or less neo-liberal changes are under debate. The Finnish literature review also demonstrates how healthcare until the 1980’s was characterised by continuing growth and diversifying of services. During the 1980’s and 1990’s it was a highly decentralised system marked by ‘steering through information’. However, since the 1990’s, recession has meant cuts in healthcare and an emphasis on efficiency. Nurse education has moved into polytechnics but at the same time nurses have experienced high unemployment levels and increases in temporary work. Recently with the economy improving this situation appears to be changing and there are signs of a shortage of nurses in the future. Finland is seen as a country that has managed to resist pressures to restructure.

Research from the Swedish literature review describes how this country, famed for its egalitarian system and pursuit of an inclusive ‘knowledge society’ expanded its social democratic welfare provision during the 1960’s, a time of prosperity, confidence and full employment and incorporated women into the workplace. Teachers and nurses were part of the workforce entrusted with fulfilling the dreams and ambitions of the welfare state. However, as the 1970’s progressed, Sweden faced economic difficulties and the public sector and its workers were blamed for being expensive and failing to meet the expectations of the citizens. Demands from society changed and there was expansion of higher
education and minor decentralisation policy changes in education. In an important law, the 1983 Health and Medical Services Act positioned primary health care as the bedrock of health provision and established special care centres (Vårdcentraler). However recession in the 1990’s has led to more major restructuring in education and healthcare and the Swedish review focuses on research projects related to these recent changes. In education, private schools were established as well as a voucher system introducing school choice and parents and pupils were given a greater voice in school governance. The implications of these reforms on both social equality and professional autonomy are debatable. In health care literature is presented on recent reforms such as greater care in the community (the ÄDEL reform, the handicap reform and the psychiatry reform) and national guarantees of waiting times for certain diagnoses defined by the state.

Literature from the Southern countries is influenced by the periods of military government and dictatorship that endured throughout the post war period until 1976 in Portugal and Spain and from 1967 to 1974 in Greece. As a result social democratic modalities only began to affect health and educational provision from the mid-1970’s onwards and subsidiary systems have been the norm. Interestingly, since this was the period following the 1973 oil crisis and subsequent period of recession, this was precisely the period when the ‘golden age’ (Hobsbawm, 1994) of welfare states began to close in the States of Northern Europe. As a result the literature on the periodisation of education and health restructuring is dramatically different between the North and South. This is of course reflected in the literature on historical periodisation of patterns of professional knowledge and authority.

Research presented in the Spanish literature review outlines the periodisation of the country’s restructuring, illustrating how it is characterised by late welfare state development, reliance on family relations and a decentralised structure. The existence of 17 autonomous regions, each with a distinctive system of governance means compiling a literature review is problematic in the Spanish context as much of the research focuses solely on one region. However, literature reveals how the system has incorporated the extension of welfare services as well as the Neo-liberal discourses about methods of service delivery, individual ‘freedom’ and cost-effectiveness. In education, when the PSOE (Socialists) gained power in 1982 a period of ‘experimentation’ was instigated where teachers enjoyed a period of creativity and autonomy and were encouraged to innovate in the creation of a comprehensive system. However the introduction of the Ley Orgánica de Ordenación General del Sistema Educativo – LOGSE in 1990 was seen as quashing this autonomy and introducing a more centralised, technocratic approach. The Conservative party’s (PP) introduction of the 2002 (Ley Orgánica de la Calidad de la Educación- LOCE) is seen as part of the Neo-Liberal trend. It has intensified assessment, given more financial power to educational establishments and more opportunity for parents to select schools. However, the return of the PSOE has changed around policy again and a new law (LOE) is under discussion. In healthcare, the literature describes how Franco’s legacy was an under developed primary healthcare system, coverage was not universal and coordination between the different networks was poor. In 1986 a General Health Care Act brought the transition to a National Health Service model and primary health care was reorganised. Since the 1990’s
however, the main concern has been efficiency with the introduction of management models and collaboration with the private sector. The *Informe Abril*, (CAESNS, 1991) proposed the split between functions of financing, buying and service provision. This has been implemented in some regions. The lack of literature on health care and nursing in Spain is noted by the European Observatory on Public Health Systems (2000) who reported on the ‘deficiency’ of information collection in the system.

Research outlined in the Greek literature review demonstrates how the development of the country’s welfare state was impeded with the civil war (1946-1949) and the 1967-74 dictatorship when civil and social rights were in question and its ideology of Helleno-Christian civilisation meant intense authoritarian scrutiny of professionals. However, with the restoration of democracy in 1974, a period of welfare state expansion and of teacher and nurse professionalisation began, with teacher training moving into universities in 1985 and decentralisation of performance assessment. A National Health Care system was founded in 1983 which established primary care health centres across Greece and the first university courses for nurses were established in 1980. Traditionally nurses have had a low status in Greece. From the 1990’s onwards the major influences in welfare state restructuring, as is represented in the literature, have been Europeanisation (Greece joined the EU in 1981) and the effects of globalisation. Athens stepped into the global spotlight when the Olympic Games returned home in 2004 but the cost of paying for the games is reverberating in the economy today affecting the provision of welfare.

The Portuguese literature review illustrates restructuring as occurring in the following periodisations. From 1945 to 1974 Portugal is characterised by the dictatorship, the later years of this era (from 1960-1974) are seen as the modern phase of the dictatorship. After the 1974-1976 revolutionary years, the mid 1970’s and 1980’s are described as a period of normalisation and return to modernisation. Comprehensive schooling was established and schools emphasised the importance of democracy. The Portuguese health care system was created in 1979 and is based on the classical National Health Service model. As the 1980’s proceeded official concerns emerged with the discourse of modernisation and economic productivity becoming more important in education and health. The conservative government introduced the 1990 legislation (“Lei de Bases da Saúde”) which increased incentives to create private heath care units and management. From the 1990’s the period is seen as one of restructuring and re-centralisation and this is represented in the literature. In education, teachers being are held more responsible for ‘outcomes’. In 1995, a socialist government came to power and in health care introduced “new public management”, the expansion of quality systems and “contract agencies” in a first attempt to promote the separation between providers and purchasers. However, marketisation and choice are often seen as more of a rhetorical discourse than a practical reality. Unemployment and instability of tenure feature strongly in the Portuguese literature on the teaching profession.

The offshore states follow more individual trajectories. The Irish literature review depicts a relatively traditional country with strong Catholic elite playing a dominant part in welfare provision and professional training. Since joining the EU in 1973, the Irish economy has accelerated hugely changing the country
from a largely agricultural society into a modern, technologically-advanced ‘Celtic Tiger.’ The country has also seen the traditionally strong influence of the Catholic Church wane. Major changes in educational restructuring include an act in 1967 which introduced universal education. Before this secondary education had been provided (at a cost) by religious orders so only a minority of students had transferred to secondary schools. A Bachelor of Education was introduced in 1974. The Education Act 1998 contained clauses introducing SEN education, continuous professional development for teachers, and transparency of admission procedures. The Education for Persons with Special Educational Needs Bill 2003 makes detailed provision for children with educational disabilities. The establishment of a Teaching Council in 2001 has created a self-regulatory body for teachers. In healthcare after years of discussion, the pre-registration nursing degree programme was introduced in 2002 for all nurse education. A National Council for the Professional Development of Nursing and Midwifery (the National Council) was established in 1999. This body provides courses and qualifications for specialisation and the development of a clinical career pathway.

Research presented in the English literature review demonstrates how in the United Kingdom the post-war ‘golden age’ (Hobsbawm, 1994) of social democracy and welfare state provision led to patterns of professional autonomy and authority that underlined the expertise and professional judgement of educational and health personnel. These patterns were sharply reversed in the 1980’s with the advent of the Thatcher era which led to wholesale change in patterns of educational and health provision and governance. English history is frequently periodised in the literature in the following way. The years from 1945-1975 are named the ‘consensus years’ – and are seen as a time when there was agreement that welfare should be expanded to create a more equal society and the public deferred to the knowledge of professionals. From the mid 1970’s recession and labour unrest led to the ushering in of the Conservative years of Thatcherism and marketisation of the welfare state. Important legislation that marked this period was the 1998 Education Act which introduced testing at ages 7, 11 and 14, the National Curriculum and self-management for some schools directly funded by government (grant-maintained Schools). In 1988 the internal market was established in the NHS. Care-in-the-Community also gathered speed. Under Tony Blair, Labour has followed a predominantly Neo-Liberal restructuring agenda which has been questioned extensively in the literature. There have been large increases in spending on the NHS and Education since Labour’s second term but literature questions the results of this. The discourse of teacher professionalisation has been sponsored with the setting up of the GTC (General Teaching Council), registration of teachers and the introduction of the probationary NQT year, but these moves can also be seen as reducing autonomy. The state of the nursing profession is seen as complex and contradictory and this is reflected in the literature which highlights nurse shortages, increases in untrained staff and nursing assistants, increase in extended roles and the establishment of the NMC (Nursing and Midwifery Council) to protect the public from poor practitioners.

The national reviews of literature make obvious the dramatically different trajectories for the North and South and offshore states and demonstrate the
hugely varied histories affecting the different countries and their restructuring and highlight how professional knowledge is deeply dependent on national and local contexts. The variety is greatest in the periods 1945 – 1995. However, in the period following 1980 but with increasing force since 1995 a convergence in patterns across the ProfKnow countries can be evidenced at the level of government discourse. The literature reveals a widely implemented dependence on marketisation and performativity criteria as the dominant language of governance and reform. In some countries such as England this process is clearly evident at policy level, whereas in other locations such as Finland and Portugal, it is more of a rhetorical discourse and is not seen as working so deeply into practice.

We would conceptualise this as a process of ‘refraction’ or ‘mediation’. In this sense each national and local system of education and health is in receipt of top-down governmental direction to develop marketisation and, or performativity schemes. But the national and local landscape refract these initiatives in deeply diverse ways (rather as when light approaches a window it is uni-directional but when it hits the window it is ‘refracted’ in an infinite variety of directions). This ongoing picture of convergent policy direction and divergent practice and professional life and work is intimately related to the future of European social models. The current debate in Europe between ‘Anglo-Saxon’ models of social development and the more historically embedded continental and Scandinavian social models frames a critical debate about the future of professional knowledge and professional community. Health and education are themselves areas where nation states and the European Community continue to have degrees of control and autonomy that are less and less available in other sectors of the ‘free market’ economy. These provide support for professional knowledge and discretion to continue to inform practice and judgement beyond the targets and profit dictates of market reforms.

The international literature review presents literature on the controversy over the nature of restructuring and the extent of convergence in educational and health systems (Altbach, 1991, Schugurensky, 1999, Dale, 2000, Edwards and Usher, 2002, Hatcher, 2001, Jacobs, 1998). Green (1997) for example argues that while there is convergence at policy rhetoric level about educational objectives, there is less evidence of any systematic convergence at ground level, for instance educational structures and processes in different countries. Esping-Andersen (1996:19) talks of a “frozen” welfare state landscape and the fact that the welfare state is proving more resilient than other key components of national political economies.

GENERATIONS

Historical periods offer different opportunities for the (re)formation of professional identities and North and South and offshore countries can be seen to have embraced welfare provision at different points of history and therefore there are differences in convergence patterns. Life histories are an attempt to understand restructuring though the eyes of professional actors and re-introduce agency to the discussion. The comparisons of the national periodisations demonstrate differences in literature not only between the ProfKnow countries but between nurses and teachers within countries. For example, the timing of
the transition into the further education systems could affect the formation of a professional generational identity. This leads onto the controversial issue about how professional identities are formed. Mannheim’s (1952) definition of generation stresses location in a socio-historical process as the source of common experience. New generations that develop out of the process of socialisation are not a unified entity but are divided by social factors (such as race, gender or class) into ‘generational units’. But Mannheim wrote that at certain critical times, a feeling of ‘generational consciousness’ would be founded and would overcome the divisions within a generation. Feuer defines generation by 1) commonness of age and 2) commonness of experience in the formative years and 3) "disillusionment with and opposition to older age groups" (Feuer 1969: 25).

There is evidence from the international literature review of the detrimental effect of restructuring on new generations of workers (Sennett, 1998, Krause, 1999, Reich, 1992). This issue has been tackled with reference to generations of teachers in England (for example Goodson, Lawn, Horne, 2001, Eliot 2002, Troman, 1996) and nurses (Bradshaw, 2001). Goodson (2003) sees older generations of teachers as being autonomous whereas the new professionals are ‘technically competent’, comply with guidelines and directives and are therefore ‘deliverers’.

There appears to be a lack of generational evidence in the national literature reviews especially in the nursing sector, suggesting that this is an under-researched area apart from Finland and England and Sweden.

In the Finnish report, Antikainen (1990) describes the work of Roos (1987) who divides the Finns into five generations: ‘the generation of wars and economic depression’ (those born in the 1910s and the 1920s), ‘the generation of post-war reconstruction and economic growth’ (those born between the mid 1920s and the late 1930s), ‘the generation of the great transition’ (those born in the 1940s and the early 1950’s), ‘the suburban generation’ (those born between 1955 and 1965), and ‘the rock generation’ (those born in 1965 or later).

The Swedish review notes a study by Kallós and Nilsson (1995) which describes four phases related to school reforms and with different kinds of teachers. 1) ‘The teachers of the comprehensive school’ are related to the introduction of the comprehensive school and its quantitative expansion. The teacher was explicitly and implicitly defined as an agent of the welfare state. Schooling was seen as an instrument to enhance the development of society. 2) ‘The regulated teachers’ – from the early sixties to the mid 70s – is a phase when teacher autonomy decreased and there was an emphasis on creating uniform schools, centralised ordinances and rules. 3) ‘The deregulated and decentralised teacher’ – from the late 70s and 80s – is a period when teachers were expected to take part in local developmental work. Municipalities, schools and teachers formally became more autonomous and the state rules more indirect. The new deregulated teacher is defined from above. 4) ‘The autonomous teacher on the market’ introduces an attack on the welfare state.
CONTEXTS
Comparisons of literature about the effects of restructuring on the nursing and teaching professions in the different national contexts reveal different disciplinary and epistemological approaches to research. This is partly because of the different historical trajectories of welfare states identified in the earlier section. Key words have different connotations in different national contexts and the task of producing a literature review is complicated by the nebulous nature of many of the concepts involved such as globalisation, lifelong learning or knowledge society. Crucially the term restructuring has different connotations and meanings in the varying national contexts. At its most simplistic, it seems that restructuring is more problematic and likely to be professionally resisted in Northern Europe than in Southern Europe. This is because in Northern Europe restructuring is associated strongly with the erosion or redrawing of the welfare state, whereas in Southern Europe is more positively associated with modernisation and expansion of services. The Greek literature review describes how global restructuring discourses are co-opted in ways that actually produce continuity of practice by combining modernity with tradition. It also highlights how academic discourses have been colonised by the English language and this impacts on the knowledge of teachers and nurses.

Literature is more easily available in some of the national contexts than others. Nursing is at a disadvantage compared to teaching as it has often been located in universities for a shorter time and the lesser depth and volume of nursing research reflects this. In contrast, subject teachers’ education has generally been located in universities for longer. In teaching, all education now takes place in universities or polytechnics in the ProfKnow member states apart from primary education in Portugal and some on-the-job training in England. In Portugal it was found that there was a lack of teaching research with most work found having been produced in dissertations as part of teachers’ career progression and there were huge gaps in the literature (for example in politics in the profession and racial issues). Nursing education takes place in universities or polytechnics in all the ProfKnow member states. In Greece, it also takes place outside of universities and in Ireland it has only moved into the university sector since 2002. Literature about restructuring of the nursing profession is heavily influenced by the medical, scientific quantitative approach. Lack of literature made reviews about the effects of restructuring in the nursing profession proved problematic in the Irish, Spanish and Greek contexts. This was also true in the Portuguese context where as a last resort, interviews had to be carried out with key informants as an alternative to reviewing literature. Research on restructuring of the nursing profession in the Nordic countries and England is however, more prolific. Keightley (2004:65) writes that nursing has struggled to find research funds at an EU level as well,

“It was almost impossible for nurse researchers to win research monies in their own right from the EU until the changes introduced in the fifth Framework improved nursing’s opportunities. Within this framework, a number of nursing research projects have been successful in their bids for EU funding.”
Another contextual factor influencing the production of the national literature reviews was access to databases. For example, the Irish literature review was conducted using search engines such as Pubmed, Ingenta and Swetswise. The English review used the BNI (British Nursing Index) NMAP (Nursing and Midwifery and Allied Health Resources - UK), Pubmed, Ingenta, ERIC and the British Education Index (BEI). There is no central agency of journal abstracts of the Spanish speaking countries, but Spain used a central database (CIDE) for the publications in education. In Finland a National Bibliography of Finland (Linnea Union Catalogues 2005) was used. In Sweden the teaching profession was researched using Arblime (connected to the Swedish National Institute of Working Life), Libris (A Swedish library catalogue), and ERIC and the nursing profession was researched using Medline, Cochrane, and Cinahl.

Examination of restructuring discourses in the literature reviews of the Profknow countries reveals many national contextual differences. However one area of common ground in the literature is the huge importance of gender. In education, the literature reviews illustrate the feminisation of the profession as well as the disproportionate number of men in higher positions in the teaching hierarchy. Primary teaching is especially female-dominated while traditionally ‘male’ subjects such as maths and technology still have higher levels of male teachers. In England the moral panic about paedophilia increasingly discourages men from being primary teachers (Burn, 2005). In nursing the issue of gender is fundamental. Across Europe, the percentage of male nurses varies, for example Portugal has the highest number with 16% of nurses being male, the UK has 12%, Ireland has 6.5%, and Greece has the lowest percentage of male nurses with 2% (Tadd, 2004). International comparisons of nursing sometimes appear to be a scale of the extent to which nurses have managed to free themselves from the male medical hegemony. For example, the Spanish review highlights literature (Medina 1999) that underlines the tacit mechanisms by which nurses internalise their subordinate status and the ways their knowledge is denied and rendered merely ‘practical’. The Swedish review cites a thesis (Dufwa, 2004) that deals with the male integration into the profession, examining issues such as what male nurses should be called and why men tend to end up in certain specialities such as psychiatry. In the Finish review, Moore (1995) writes that the medical profession dominates situations on ward rounds. In the international review, different models for power-relations between doctors and nurses are presented (Friedson, 1988, Mackay, 1993, Hughes, 1988, Svensson, 1996 and Allen 1997). Today expanded job opportunities mean nation states cannot rely on women as a cheap source of high quality labour.

Research in the national reviews attempts to evaluate the impact of a secularising society across Europe (Bruce, 2002). The decline of religion can be seen as influencing the concept of vocationalism in professions (Tawney, 1937). The literature reviews also highlight the differing roles of the church in the national contexts. For example, in Ireland the secularising of society has meant a decreasing role for religion in schools. Choice in the Irish context refers to the public demand for choosing a multi-denominational school (primary) or a gael scoileanna (Irish medium school). In England, choice means the 2002 Education Act that introduced the concept of faith schools such as new Evangelical Christian and Muslim ones. In Greece, the influence of the
established Church was never broken after the dictatorship and so churches still play an important role, whereas in Spain, the church was closely associated with the dictatorship and so lost power in the transition to democracy. However, since 2002 when private schools could receive public funding and choose pupils, the church has regained power as many concertadas are often church schools. Churches’ can play a role in halting/subverting Neo-liberal discourses in some contexts for example, ownership of the land that schools are built on means in England churches have prevented the selling of sports fields to house-builders for profit.

Europeanisation is negotiated differently in the literature of the ProfKnow countries. European discourses are chiefly mentioned in the Irish and Greek literature reviews. It can be surmised that this is because they are more affected by this issue than other countries. The ProfKnow member countries joined the EU at different times (Ireland and the United Kingdom joined in 1973, Greece in 1981, Spain and Portugal in 1986 and Finland and Sweden in 1995) and faced different restructuring challenges associated with their membership and their national literature reviews reflect this, for example, in Sweden, joining the EU meant a relaxation in Labour laws reducing job stability. In Finland, membership of the European Union was applied for after its friendship treaty with the Soviet Union became void. The Bologna plan (1999) and the Lisbon Declaration (2000) can be seen as a move towards introducing ‘the market’ into higher education provision in Europe. In nursing, EU declarations on the definition of a ‘generic nurse’ are controversial and have meant changing national syllabuses.

The balance between decentralisation and centralisation can be seen as a very different discourse in the literature of the different national contexts. This issue is most evident in Spain where decentralisation was merged with the democratisation process. The country is divided into 17 regions which all have their own directly elected authorities so provision of welfare is complex and patchy and non uniform with Catalonia, the Basque Country and Galicia having special status with their own language and other rights and Andalucia, Navarre, Valencia and the Canaries having more extensive powers than some other regions. In the UK substantial powers over education and health have been devolved to the new National Assemblies in Scotland and Wales. In contrast Greece and Portugal are seen as relatively more centralised systems which affects the autonomy of professionals in these countries. The balance between decentralisation and centralisation is complex and powers have been increasingly decentralised to local schools and hospitals, but power at the centre has been retained or increased by new modes of governance such as targets and testing. Silva and Falcao (1995) from Portugal reported on the introduction of reforms to the management model in a multiple-case school study and found that although teachers had been given more freedom they did not use it as they were unable to free themselves from their customary centralised traditions. National Curricula can be seen as a centralising form of governance, and their introduction or modification is reported in the literature reviews, for example, in England, Goodson (1990) discusses the national curriculum and its role in national identity. In Greece teacher autonomy related to the curriculum is discussed by Mavrogiorgos (1992, 1993) and Thoma 2004. In Finland a
National Curriculum was introduced in the 1980’s then replaced by guidelines in the 1990’s, only to be reintroduced recently.

When examining literature on privatisation of education and healthcare the importance of the different national contexts is crucial. In every country it is possible to find several models and practices and countries rarely think the same way concerning what is public and private, centralised and decentralised, state and market. Again there is contradiction between the Northern and Southern countries. In the North there is less privatisation and complaints are about erosion of welfare state entitlement, this is in comparison to Southern states where there has traditionally been greater reliance on the private sector. For example in Greece there is a steady increase in private sector schooling and as the Greek national case study describes, 58% of the overall number of beds available were in private hospitals in 1981 (Souliotis 2000:179). In Spain a dual system of education has been developing since the law that allows public funding of private schools. These ‘concertada’ while nominally free require contributions and have effectively created a two tier segregated education system with implications for professionals working in them. However, according to the Spanish literature review, in the Spanish context this is seen as normal and little literature is devoted to this issue. A privatisation issue that does cause controversy in Spain is the disqualification of infants (0-4) from public provision of education since the LOCE.

Literature from Ireland and Greece show the growth of private crammers for preparing children for exams, know as grind schools in Ireland and Phrontistiria in Greece is seen as an important current issue. According to the Greek review, 54% of students attended Phrontistiria for extra school tuition in 1984 while in 1993 this percentage increased to 65% (Kassotakis, 1995). In the English context literature on privatisation focuses on restructuring since Thatcher’s era. Privatised services such as school dinners and hospital cleaners have surfaced recently in the media with high childhood obesity rates blamed on poor school meals and high MRSA rates in hospitals blamed on poor hygiene. With New Labour since 1997 these processes can be seen to have become more complex with tendering out of services and involvement of the private sector in many initiatives such PFI school and hospital building schemes. The English literature review finds where nurses used to think of them selves in terms of vocational service, they now have to think in terms of nursing labour (Hunt and Wainwright, 1994, Bradshaw, 2001). The Irish review cites an OECD (1997) report on hospital productivity as measured by bed occupancy and reports that average length of stay has decreased, suggesting a possible increase in nurse workload. In Ireland in 2003, a private provider, Hibernia College was accredited a Primary Teacher Diploma Programme. This is significant in the Irish context, and has many of the hallmarks of a privatisation agenda, though it is presented by the DES as a necessity due to the inability of existing providers to meet demands. Literature from the Swedish review explains how the school monopoly was broken up in 1992 in Sweden and a system of competition between schools on a quasi-market system was introduced together with a voucher scheme introducing parental choice. Previously almost no private schools had existed in Sweden but these now became a feature of the system.
Increased emphasis on efficiency in schools can lead to greater specialisation of professionals. For example in England and Finland there are increases in special needs teachers, student counsellors and school assistants. This situation is similar to the specialisation that nurses have always experienced but is also seen to be increasing in health care in some contexts.

Literature from the national reviews also demonstrates how Neo-Liberal ideas of New Public Management together with governance by standards and auditing are another area of difference in the various national contexts. For example, the English chapter notes literature that criticises the ‘idolatry of measurement’ (Fielding 1999) in schools. In contrast in Ireland, the Department of Education and Science refuses to make available data on the performance of schools. In Spain, the approval of the LOCE in 2002 has introduced a system of indicators for comparing schools. The Spanish literature review cites Aubert and de Gaulejac (1993) who discuss the explosion of management in healthcare and the effects on workers. In the Swedish review, the thesis of Blomgren (1999) examines new management accounting models and healthcare professionals.

Literature from the ProfKnow countries shows they face very different situations when it comes to the supply of teachers and nurses. The Greek review highlights the major problem of teacher unemployment. Up until 1998 this meant teachers were placed on an appointment list - ‘epetirida’ and were given a job based on seniority which was seen as democratic. The new system introduced an exam regulated by the state (ASEP) with those who did best obtaining jobs depending on market forces. Literature from the Portuguese review also highlights teacher unemployment. Over-supply means that teachers are forced to re-apply for their positions every year and success is dependent on their exam results. This leads to frequent job changes especially for younger teachers who are unable to improve their professional knowledge in one location. So in Portugal the literature focuses on the issue of how younger teacher tenure leads to instability, anxiety and difficulty in creating a sense of belonging in a school which also means forming school leadership teams is difficult (Cavaco, 1993, 1990, Brandão, 1999). In England on the contrary, teacher shortage has been an issue since the 1980’s affecting morale in the profession. Wastage is a huge problem with half of newly qualified teachers leaving teaching within 5 years (Horne, 2001). This could also be explained by freer labour markets and greater individualism meaning that the old idea of a job for life has died. In Ireland there is a shortage of primary teachers and secondary teachers (until 2004-2005) and again especially maths and sciences. This is put down to economic success offering better opportunities for graduates. An OECD report (Simoens et al., 2005) concludes that nurse shortages are an issue across developed countries. Among the ProfKnow countries England has experienced the greatest shortages and in 2001-2002 for the first time, more overseas nurses were added to the nurse register than home nurses. In Ireland in 2001, two thirds of new entrants to the nursing register were from international sources. Meanwhile Spain and Finland have been exporters of nurses due to nurse unemployment. In Finland, Santamaki (2004) finds 30 % of nurses did not have a permanent position.
Literature presented on the role and power of trade unions also demonstrates the difference between national contexts. For example, the Greek chapter notes literature on the 1997 teachers’ union strike (Pigiaki, 2000). In England Thatcher is widely seen to have broken the unions and their power in the 1980’s (Carter, 2004). The Irish review reports on a recent bitter dispute lasting three years where The Association of Secondary Teachers in Ireland (ASTI) withdrew support from the Irish Congress of Trade Unions and the Programme for Prosperity and Fairness and refused to participate in the government review of public and private salaries. The ASTI were dissatisfied with their current salaries and pay structure. In healthcare, the Greek review cites Anton (1998) as calling for nurses to unite but writes that the fight for their rights has yet to start. In Ireland, nurses have become more militant in recent years with a nurses’ strike being called in 1999 to fight for better conditions.

The Teaching and Nursing Professions

The international literature review reveals discussion on all aspects of professions - how they can be defined, who belongs to one, to what degree they are constant over time and to what degree they can simply be seen as societies dedicated to ‘closure’ (Weber, 1968). The national literature reviews provide evidence of professionalisation and de-professionalisation in teaching and nursing demonstrating the complex and often contradictory situations.

There is a huge amount of well-established literature about current trends in teaching and the implications of restructuring on teaching in the developed world. Trends of de-professionisation, de-skilling and intensification of teachers work are well documented (Apple, 1982, Goodson and Hargreaves, 1996, Harris, 1994, Lawn, 1996, Troman, 2000, Easthope and Easthope, 2000, Apple and Jungun, 1992, Hall 2004). However, Goodson and Hargreaves (1996) also find that teacher professionalisation is being sponsored by governments, bureaucracies and big business but that it is a contradictory, confused and paradoxical process.

Literature from the ProfKnow national reviews supports both these arguments and illustrates the importance of the local context. For example, literature from the Swedish review, (Beach, 2003) is cited as focusing on regulations in upper secondary school where a key interest is ‘role contradictions’ and ‘erosions of professional self’. Falkner (1997) sees the Swedish school as an area of proletarianisation and finds teachers referred to as executors (not initiators) in policy-makers’ literature. The Swedish review reports on a project carried out by Persson and Broman (2002) that finds schools and teachers are given increasing responsibility not only for teaching but also for bringing up children. It notes the plurality of the post-modern childhood in contrast with the institutional ideology demanding homogeneity, stability and normality and how this presents a “quite different job” for teachers.

In the Finish literature review Simola, Rinne and Kivirauma (2001:90) state the professional profile has changed from teaching and learning to all-inclusive care of the pupil. Niemi (1998) writes about teachers as learners due to a continuously changing society. Kohonen and Kaikkonen (1998) see the traditional view of the teacher working alone in the classroom as strong but the
emphasis is now on being pupil and community centred. Another study (Luukkainen, 2004) states teachers are finding control of their work threatened in the transition from central planning, to guidance through evaluation and monitoring, but the new situation can offer opportunities. He concludes that the future of teaching is for ethical teachers with a central role in developing society. Webb et al. (2004) also report that reforms have increased workload in Finland as goal-steering and management by results are more time-consuming and demanding requiring whole school activities and joint teacher preparation.

In England the literature reports some teachers feeling de-professionalised by issues such as payment by results, Ofsted inspections and national testing, new initiatives for colleague interaction, the use of classroom assistants and increased ICT blurring the home/work boundaries. Added to this is the incorporation of SEN children. The creation of the General Teaching Council (2002) can be seen as fulfilling a long-held ambition of teachers to have the same status as other self-regulating professions or greater surveillance and control of a profession that cannot be trusted. Hoyle (2001) notes how the Government Office for National Statistics has elevated teachers into the same bracket as doctors and solicitors while at the same time introduced the measures that are seen to intensify their work.

The Spanish literature outlines how the 1980’s was seen as a period of teacher freedom and innovation however with the LOGSE in 1990, and the imposition of a national curriculum, teachers became the assurers of dissemination rather than creators of material (Rodriguez 2001a). Teachers were ‘forced’ to learn the desired official content as in-service training was linked to the salary scale. The LOCE has been seen to undermine the competence of teachers by giving renewed authority to the headmaster and taking it away from the School Council. Arenas Vazquez (2001) writes that giving parents a voice on this council has also taken away from the professionalism of teachers. He writes of a crisis in the profession in Spain due to restructuring damaging the professional culture of teachers and group cohesion. In contrast however, literature from Portugal highlights the egalitarianism of the teaching profession (Caria 1999, Sanches 1987, 1990). In Greece, a large number of recent research projects address issues of the construction of the professional self and cultural identity (Kaila 1993, Frangoudaki and Dragonas, 1997, Giannakaki, 1997).

In Ireland, restructuring has occurred very recently and it is seen that there is an absence of literature and it is too early to say what the impact and implications for the teaching profession are likely to be. The recent shortage of teachers meant that unqualified personnel were drafted in to work as teachers. This may have had a negative impact on the prestige of the profession as might the intensification of school inspections. The establishment of a Teaching Council in 2004 as a self-regulatory body may be seen as professionalising or de-professionalising.

Literature from the nurses’ reviews is less conclusive about implications for nurses restructuring in terms of professionalisation or de-professionalisation. The international review cites Gordon (2005) who identifies a world-wide crisis in nursing due to health care cost cutting and hospital restructuring undermining
the working conditions necessary for quality care. She shows how the historically troubled workplace relationships between nurses and doctors has become even more dysfunctional in modern hospitals. Gordon pays particular attention to the discourse of caring, its origins and its political and social impact and how it marginalises nurses' expert knowledge and skills in favour of reinforcing gender stereotypes by emphasising their apparent virtues.

The national literature reviews reveals the role of nurses differs greatly across the ProfKnow countries as well as being divided between different specialities based on different professional knowledge. Nurse education programmes differ, for example they prepare general nurses in Greece, Portugal and Spain. But they may also prepare specialised nurses, such as paediatrics, gerontology or psychiatry in addition to general nurses such as in Ireland and the UK, Sweden and Finland. Midwifery is considered to be a specialisation within nursing, as basic nursing education is required in Ireland, Luxembourg, Portugal and Spain, while in Greece and the UK midwives are educated in separate educational programmes. There is considerable difference between the number of practising nurses per 1000 inhabitants, for example, Greece (1.26) and Portugal (2.84) have the lowest in Europe and Finland and Sweden the highest (13.7) and (13.1), with the UK (9.23) Ireland (7.68) and Spain (3.03) in between. The percentage of registered general nurses in relation to the total number of hospital employees also differs greatly, for example this figure is 17% in Portugal while it is about 45% in Ireland and England (Tadd, 2004).

However, when examining literature on restructuring of the nursing profession, some common themes across the ProfKnow countries can be identified. Similar issues arise in health care of technological advances, pressure over costs, inter-professional relationships, team-working, marketisation, the expansion of primary care provision, assuring quality of care under the demographic strain of ageing populations and increased involvement of patient and consumer groups.

The expansion of primary health care is seen as an issue in the literature of the ProfKnow countries with implications for the nursing profession. There is a North/ South issue here as the more recent roll out of primary care in the Southern countries means it is seen as more important in these contexts. The Greek review describes how legislation creating the establishment of primary health care centres across the country in 1983 has created new places of work for nurses but it has not led to greater responsibilities or extended roles due to the large numbers of doctors. The Spanish review cites Ortega and Sanchez (1996) who summarised the impact of the change to primary health care and noted nurses were now defined by their role not where they worked, nurses were seen as resources for the population (increasing their claims to autonomy and creativity) and the notion of team-work re-situates nurses in a less dependent position. However further work (Giménez, 2003) notes that change is a gradual process and depends on nurses taking up the opportunities offered. In Sweden, reforms in the 1990’s (the handi-cap-reform, the psychiatry-reform and the ADEL-reform – elderly care) meant that nurses are increasingly working in primary care.
Scott (2004) analyses the question of autonomy for nurses in Europe. She finds a tendency to confuse autonomous practice with moral autonomy and believes that nursing has some way to go before it can be claimed they are autonomous professionals. The Irish review reports the nursing profession has become more assertive and independent in attitude for example, An Bord Altranais (2000a) development of independent nurse specialists. From England, Sleicher (1981) expresses a typical view that in many ways has not changed that nursing is not a profession as it lacks a body of knowledge, levels of education, extensive autonomy and the notions of service falls short. However the growth in extended roles of nurse practitioners, nurse consultants and nurse prescribing is seen by some as professionalising nursing. The Irish reports that nursing does meet many requirements of the professional category. Nurses receive formal education and training in Higher education; professional competence is guaranteed by the use of university examinations, nurses have a code of ethics to guarantee professional integrity as well as a professional body.

From Finland, Henriksson and Wrede (2004) state that the welfare state has created a special environment for the development of occupations in social and health care. Hildén (1999) analysed the competence of Finnish nurses since the 1990’s and the emphasis on flexibility to deal with the changing workplace. A Finnish study by Eriksson-Piela (2003) examined the nurses and nursing auxiliary relationship and finds professional knowledge is a reflection of the new expertise that is based on scientific knowledge and customer-based practises. Henriksson (1998) examines significant events of the professionalisation process of health work in Finland. Core issues being skill, education and definitions of vocations and hierarchies. In Spain a 2005 COIB Report noted that the definition of the nursing role was a central one. It also found that nurses themselves defined their work in an altruistic way. However, nursing was not considered a way of life at the centre of nurses’ lives but a way of making a living.

Gascull (2004) explores interprofessional relationships of nurses across Europe, with Spain and the UK in focus and draws attention to the growth of team working. The Portuguese literature review (Monteiro, 1999) highlighted the balcanized structure of hospitals. In the English literature review, Stubbings and Scott (2004) analyse the literature on extended roles and the implications of the changes in the NHS and ramifications for multi-professional working practices. They note the increase in doctors but the decrease in qualified nurses. In England the increase in healthcare assistants due to cost pressures, nurse shortages and nurses taking over jobs previously done by doctors, means that Health Care Assistants often undertake many core nursing jobs. Sweden and Finland also presented literature around the issue of auxiliary nurses. In Ireland, the Irish Nurses Organisation (INO) is currently fighting the introduction of healthcare assistants until roles and boundaries have been agreed. The Irish literature review reports how nurses may be loosing responsibilities in some areas such as care of diet, mobilization and counselling as these areas may have been taken over by other professionals.

Teacher and nurse stress is a discourse found in the ProfKnow national contexts. An international literature review of teacher stress (Jarvis 2002) suggests that it is a global phenomenon. For example, in England, government research has
found that teachers and nurses were the occupations with the highest levels of stress (Health and Safety Executive 2003/2004). In Portugal research (Lens and Jesus, 1999) found that women teachers suffered less stress and were more content than male teachers, while Correia and Natos (2001) documented strong tensions between teachers’ private and professional lives suggested the reason for this was increases in administrative work leading to ‘ethical suffering’. In Greece, Argyropoulou (1999) discusses causes and management of stress while (Leontari, 2000) reported that only a small number of primary teachers reported a high level of stress but those who tended to do so were more likely to be female and working in rural areas. Vlachopoulos (1999) found that burnout syndrome is generally adding up, while the vacations may suspend its excessive gathering. Kourtesi (2002) investigated teachers’ strategies for managing occupational stress in Greece. She found that women get support from their social environment. Less literature was presented on the topic of nurse stress from the Profknow countries apart from England were it is seen as a problem (Sheward 2005, Rowe and Sherlock, 2005, Winstanley and Whittington, 2004). Finland also found that 75% of nurses were experiencing a lot of or some stress (Partanen et al. 2005). In nursing there is a contradiction between educating professionals to care, who in practise will be rationing care resources.

**Teachers and Nurses’ Professional knowledge**


Postmodernism and the growth and spread of information means the teacher-as-the-font-of-knowledge has changed and their role could now be seen as the leader-of-a-group-of-knowledge-seekers. An interesting study from Portugal (Fontoura, 1992) examines the anxiety history teachers felt in their professional identity caused by epistemological and methodological uncertainties. There was a ‘gap’ between ‘the history the teachers had learned and the history they were asked to teach’ - instead of transmitting facts they discussing subjective possibilities and the teachers lacked confidence about the ‘meaningfulness’ of teaching history in this context.

In health care the days of when doctors and nurses ‘knew best’ and patients deferred to their superior knowledge have past (Coulter, 2002, Muir-Grey, 2002). The English review cited (Maddox, 2004) research about how increased medical knowledge gained from the internet is changing the dynamics between healthcare providers and consumers. However, equal access to this knowledge is a question of social justice and needs addressed. The Finish study also presents evidence that 95% of nurses used ICT in their daily work and ICT is changing the relationship between providers and patients.
Rafferty describes ‘new knowledge regimes’ (health economics, health services research and evaluation or outcomes research) that started in America in the 1970’s and have come to Europe via various consultancies and organisations set up to promote it. Focus on auditing has led to the bio-medicalisation of knowledge – probabilistic knowledge replaces experience in practice and incorporates cost-evaluation. Teachers and Nurses are now expected to be continually updating their professional knowledge and performing according to ‘best-practice’ or in health care, evidence-based practice (EBP). Hole (2004) examines the development of the concept of EBP throughout Europe and its increasing importance as part of nurse knowledge as the general public becomes increasingly informed and as a way of managing costs and improving efficiency.

The National literature reviews demonstrate that in many ways the same patterns are occurring across the ProfKnow countries – such as the move into the universities of primary education and nurse education. This trend can also be seen to be challenged for example by the small numbers of untrained graduates now being allowed into schools as part of the ‘Teach First’ scheme in London or the untrained teachers being allowed into classrooms in Ireland due to shortages.

The theory/practice debate in education can be seen from the literature to be unresolved in many countries with training/education being decried as either being impractical, insufficient or too academic. The situation has also arisen where just as primary teachers and nurses in Europe have been entering the universities, the massification of education and lack of quality assurance for courses means that it confers much less status. This can be seen as credentialism (Collins 1979) where certification is required to get a job but actually just acts as a form of social selection. Actually many people are over-qualified for the jobs they are doing in service-sector dominated economies. In other cases people have the qualifications but these do not mean they are competent. Literature from the ProfKnow countries demonstrates that education for competencies and performativity creates tensions in teacher identity. For example, a Portuguese study, (Caria, 1997) looked at maths teachers’ professional knowledge and found four types of mathematics “curricular cultures”:

1) A “culture of execution” (programme coverage more important that applying the knowledge to real situations)
2) A “culture of mitigated execution
3) An “instrumental culture” (teachers attempted to turn mathematics into a resource that students could use)
4) A “conflict culture” (conflicts between institutional demands (such as covering the whole program) or educating students to understand)

In England teachers and nurses are seen as ill qualified by their university education and so teachers now have to work for a probationary year with NQT (Newly Qualified Teacher) status before becoming qualified. In nursing greater supervision and mentoring is being introduced for recently qualified nurses.

Evidence from some of the ProfKnow countries showed that nurses and teachers felt they were lacking knowledge in certain areas. Health and education professionals are increasingly being called on to teach and care for a more diverse population. For example, the Swedish literature review notes a study highlighting the issue of how
second language teachers may feel marginalised (Wigerfelt, 2004). The Spanish review notes the challenge of how to attend to a more diverse student population (as created by the LGE and later the 1990 LOGSE – which raised school age to 16 as well as the doubling of immigrant pupils from 2000 -2002) and how to prepare students for the information society as reflexive learners rather than information memorizers. The Finish report notes that research shows student teachers felt their education was lacking in giving them the skills they needed in multicultural schools. The report mentions literature by Talib (1999) who found teachers felt their education did not prepare them for multicultural teaching, although In-service teacher education was helpful. The Irish report found a lack of knowledge of multicultural teaching as well as Special Needs since the recent legislation (Equality 1998, Welfare 2000 and Disabilities 2003) had introduced a more diverse student body. The Irish report noted new guidelines (NCCA, 2005) to support teachers in developing a more inclusive classroom environment.

A key issue in the Spanish literature review is the ‘insufficient’ and ‘inadequate’ overly academic initial teacher training and the ‘instructional’, nature of much of in-service training. This situation is also reported in the Greek literature review, which notes there is no pedagogic tradition for secondary education. In Greece there has been an explosion of programs of further education and teacher unemployment means teachers feel compelled to ‘chase certificates’ even though they feel the state organised INSET training is poor and provided as a duty of the state not as a right of teachers. Vergidis reports a lack of strategy for evaluation of the programmes (Vergidis1992a, 1992b). An example is the national programme to adjust graduates of the 2 year course of the Pedagogical Academis with the graduates of 4 year university courses. This has been characterised as a programme of devaluation of teachers as it only contributes to the acquisition of another certificate due to its poor quality rather than improving professional knowledge (Demir 2005). The Portuguese report cites Loureiro (1997) as finding teachers were unhappy with the levels of support and the absence of in-service training that might help them adequately implement reforms.

Literature from the international review and the national reviews shows that ICT and technology is impacting on professional knowledge in education and health. For example, an OECD’s research report, noted in the Greek chapter, Schooling for Tomorrow: Information and Communication Technology and the Quality of Learning (Kynigos, 1998-2001) found that it is a given that to take full advantage of ICT and learning, it is necessary to change teachers’ perceptions towards it. Finland highlighted the gendered approaches to technology whereas Portugal noted lack of ICT facilities as a hindrance to progress.

This summary has compared the international literature review with national literature reviews of the ProfKnow countries. The literature has been examined in terms of periodisation, generations, contexts and professions. The literature illustrates how in the period following 1980 but with increasing force since 1995 there is a convergence in restructuring patterns across the ProfKnow countries at the level of government discourse. There is a lack of literature comparing generations of teachers and nurses and the ProfKnow project hopes to explore this issue. Examining restructuring of education and healthcare reveals wide contextual national differences, however there is a significant amount of
literature especially in education to suggest that marketisation and performativity reforms are having effects on the morale of teachers and nurses in Europe.

This problematic conclusion is underlined by the analysis of the periodisation of professional knowledge and opportunities and associated profound differences found in the way the different generations of teachers and nurses have experienced their professional life and work. It points to the need for a period of analysis and reflection about the distinctive attributes of the European model. A consideration of how world movements of restructuring and performativity need to be negotiated and mediated according to the distinctive and widely supported social priorities of the European Model is long overdue.
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Appendix 1

International literature review databases search

Keywords

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<th>Professions and Professional knowledge</th>
<th>Restructuring</th>
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**NURSING**

**PubMed** (An English-language service of the National Library of Medicine, includes over 15 million citations for biomedical articles back to the 1950's.

A key word search of *restructuring* and *Nursing* resulted in 1219 articles.

**CINAHL** (Cumulative Index to Nursing and Allied Health Literature - which contains articles published in more than 950 English-language nursing and allied health journals as well as virtually all publications of the American Nurses’ Association and the National League for Nursing.)

A key word search of *Restructuring* and *Nursing* resulted in 895 articles

**IngentaConnect** (A US/UK Library Service with a collection of over 6,100 online and 28,500 fax and Ariel delivered publications.)

A key word search of *Restructuring* and *Nursing* resulted in 58 articles.

**Web of Science** (Provides access to: Arts and Humanities Citation Index, Science Citation Index and Social Sciences Citation Index)

A key word search of *Restructuring* and *Nursing* resulted in 107 articles

**TEACHING**

**ERIC** (The Education Resources Information Centre, sponsored by the Institute of Education Sciences (IES) of the U.S. Department of Education).

A key word search of *restructuring and teaching* resulted in 1480 articles (1990 – 2004).
A key word search of *restructuring and teaching* resulted in 62 articles.

**Web of Science** (Provides access to: Arts and Humanities Citation Index, Science Citation Index and Social Sciences Citation Index)

A key word search of *Restructuring and Teaching* resulted in **150 articles** (1970-2005)