



Structures of Education,
Vocational Training,
and Adult Education,
Systems in Europe

PORTUGAL

2003

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INTRODUCTION

Europe is characterised by a very wide variety of education and training systems. In order that this diversity should be fully appreciated, EURYDICE, the information network on education in Europe, the European Centre for the Development of Vocational Training (CEDEFOP) and the European Training Foundation (ETF) regularly update a set of national monographs entitled *Structures of Education, Vocational Training and Adult Education Systems in Europe*.

Descriptions relating to individual countries in turn include basic information on the administration and structure of their systems of education and initial vocational training at all levels (from pre-primary to tertiary). Also included are descriptions of initial vocational education and training in alternance and adult education and training within provision for lifelong learning. The initial and in-service training of teachers and their status are also considered.

The information is set out in accordance with a common structure to facilitate inter-country comparisons while ensuring that special features peculiar to each system are duly emphasised.

The description for each country is preceded by a diagram of its education system. Here again, the way the diagrams are presented has, as far as possible, been standardised so that common – and differing – features of the various systems can be more easily identified and compared.

The first chapter within each country section is devoted to a short presentation of the country concerned, together with the basic principles governing its education and training, the division of responsibilities and then more specific information (relating to administration, inspection, financing, private schooling and advisory bodies). The major reforms of education systems are also considered.

The other chapters deal in turn with pre-primary education, compulsory and post-compulsory education (general, technical and vocational provision entirely within schools). The way these chapters are structured depends on each national context. Where pre-primary education is not in reality separate from primary education, or where compulsory education spans different levels, no artificial division has been created. In the case of all countries, a brief description of the aims and structure of the level of education concerned is followed by further headings devoted to the curriculum, assessment, teachers and statistics.

Initial vocational education and training in alternance is the subject of a chapter in its own right. It includes all education and training for young people that is not essentially school-based, and thus covers for example apprenticeships based on the 'dual system' pattern, sandwich course training and any other initiatives and experiments with major elements of 'on-the-job' experience.

This is followed by a chapter on tertiary education, in which a summary description is supplemented by sections on admission, tuition fees, the academic year, courses, qualifications and assessment. The chapter includes any initiatives implemented as part of the Bologna process.

The last chapter deals with continuing education and training for adults (whether in or outside the labour market, employed or unemployed). It provides information on the political, legislative and financial framework of this kind of education, on the authorities concerned and their responsibilities, as well as on the general organisation of training for adults (types of institution, access requirements, programme objectives, the curriculum and quality assurance). There is also a brief description of guidance/counselling services, as well as of questions relating to assessment and accreditation including the recognition of non-formal kinds of learning.

The situation regarding teachers is dealt with in a specific section for each level of education discussed. Also provided are national statistics on the number of pupils, students, teachers and educational institutions and, where figures are available, on pupil or student/teacher ratios, attendance and attainment rates or, yet again, on the choice of branches of study or areas of specialisation.

The National Units in the EURYDICE Network have drafted the descriptions for their countries, each using the same proposed outline of content as a common framework. The information on initial vocational education and training in alternance, and on adult education has been prepared in close collaboration with members of the CEDEFOP REFER Network (in the case of the European Union and EFTA/EEA countries) and the National Observatories of the European Training Foundation (ETF) in the case of the 12 candidate countries. We are extremely grateful to them and to all those who were involved in this project in the EURYDICE European Unit in Brussels, CEDEFOP in Thessaloniki, and the ETF in Turin for their invaluable contribution to this fundamental source of information which is vital to a better understanding of education and training systems in Europe.

Given the number of countries now covered ⁽¹⁾ and the amount of data available, the description of each system of education and training may be consulted solely electronically on the website of the EURYDICE Network (<http://www.eurydice.org>), which brings it to the attention of the largest possible number of people and enables it to be updated on a more regular basis.

Patricia Wastiau-Schlüter
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European Unit

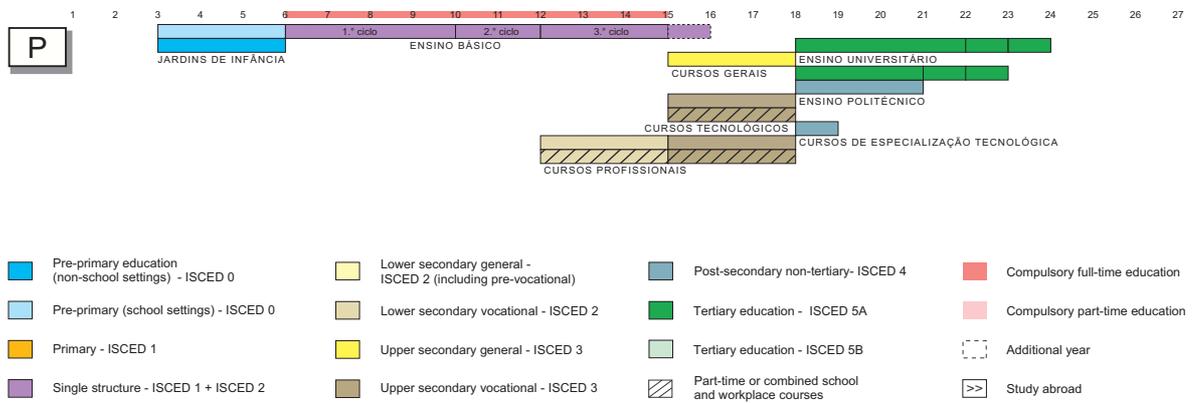
Johan van Rens
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June 2003

⁽¹⁾ The 30 European countries taking part in the EU Education Programme, Socrates.

Organisation of the education system in Portugal, 2003/04



Source: Eurydice.

1. RESPONSIBILITIES AND ADMINISTRATION

1.1 Background

Portugal covers a total area of 91,851 square kilometres (Azores: 2,352 km²; Madeira: 795 km²) and has a resident population of 10,355,824 (2001 data).

Portuguese is the language spoken throughout the country. The dominant religion is Roman Catholicism.

In accordance with the Constitution, Portugal is a Democratic Republic. The Head of State is the President of the Republic; legislative power is vested in the Assembly of the Republic. Both are elected by direct universal suffrage. The head of the Government is the Prime Minister.

The archipelagos of the Azores and Madeira are Autonomous Regions with Governments and Regional Legislative Assemblies with considerable powers. Throughout Portugal there are *autarquias* (local authorities), municipalities and *freguesias* (parishes).

In 2000, Gross Domestic Product (GDP) was 3.4% (in real terms), private consumption was 2.6% and public consumption was 2.5% (in real terms).

External trade in goods and services was 14.6% for exports and 14.0% for imports. The unemployment rate among the population of working age was 4.0%.

1.2 Basis of the education system: principles-legislation

Principles

The education system comprises a set of facilities that ensure the right to education and guarantee equal opportunities in terms of both access to school and success at school.

The State is responsible for the democratisation of education; it is not entitled to direct education and culture on any particular philosophical, aesthetic, political or religious lines. State education is nondenominational, but the right to found private and cooperative schools is guaranteed.

The Comprehensive Law on the Education System of 14 October 1986 (46/86), revised by Legal Decree of 1997, established the general framework for the reorganisation of the Portuguese education system, setting out the organisational principles which determine the objectives of the system. These are: contributing to the defence of the national identity and the respect of Portuguese culture, as well as the self-realisation of those being educated; securing the right to difference; developing people's ability to enter the workforce with a solid basis of general and specific training; decentralising and diversifying educational structures and activities; contributing to correcting the asymmetries of regional and local development; providing second-chance schooling, as well as equal opportunities for both sexes; and developing the spirit and practice of democracy, through the adoption of participative structures and processes.

The act setting out the legal framework of the whole of vocational training, independently of the educational or employment situation of which it is part, dates from October 1991.

Legislative basis/Major reforms

For decades, there was no overall educational reform in Portugal. The Comprehensive Law on the Education System (*Lei de Bases do Sistema Educativo* – LBSE) established the bases of a reform, in particular with regard to structures and curricula, programmes and methods, assessment systems, complementary education and educational support systems, human resources, and the administration and management of the school system.

a) At the pre-primary level, whilst the law published in July 1973 approving the reform of the education system considers pre-primary education as an integral part of the system (following it with two other legal acts defining its objectives and creating the official Nursery Schools), it was only in 1986, with the publication of the Comprehensive Law on the Education System (LSBE), that pre-primary education was integrated into the general framework, with its generic objectives being defined in terms of the balanced training and development of children's potential, to be undertaken in close cooperation with the family environment.

In 1995, the Ministry of Education (ME) developed a plan to expand the pre-primary education network in order to ensure greater coverage. It also defined the creation and maintenance of the system of financial support, as well as the criteria to be observed in establishing and operating pre-primary establishments.

In 1996, the Ministry of Education, together with the Ministries of Solidarity and Social Security, of Infrastructure, and of National Planning and Administration, launched the Pre-primary Education Expansion and Development Programme (*Programa de Expansão e Desenvolvimento da Educação Pré-Escolar*) with the objective of developing proposals for pedagogical intervention in curriculum development and teacher training, and to promote and supervise the launch of innovation, training and research programmes.

To fulfil these objectives, an Office for the Expansion and Development of Pre-primary Education (*Gabinete para a Expansão e Desenvolvimento da Educação Pré-Escolar*), was set up until December 1999, following the approval by the Assembly of the Republic of the Framework Bill for Pre-primary Education.

In 1997 the Framework Law on Pre-primary Education was published (Law no. 5/97 of 10 February). This Law further develops the principles already enshrined in the Comprehensive Law on the Education System, which establishes the legal framework for this stage of basic education, and defines the general, pedagogical and organisational principles.

The new legal framework gives expression to the following objectives: the creation of a national pre-primary education network, including both a public and a private network; officialising families' right of participation in the development of educational plans and objectives; defining the instruments of institutional cooperation between the various government departments involved in the Pre-primary Expansion and Development Programme; defining the organisation of pre-primary educational establishments as well as the conditions for supervision and financial support.

In 1998 a special credit line was set up for financing projects under the Pre-primary Education Development and Expansion Programme.

The Ministries of Education and of Labour and Solidarity cooperate in promoting the expansion and development of pre-primary education. The first ministry guarantees the teaching quality and the second the necessary financial support to

families. The financial support is funded by both ministries.

b) Compulsory and Post-Compulsory Schooling: With the publication of the Comprehensive Law on the Education System (LBSE), compulsory education was extended to 9 years of Basic Education consisting of 3 cycles, plus 3 years of post-compulsory schooling (one cycle of Secondary Education) intended for pupils who either wish to continue their studies (general courses) or wish to enter working life (technology courses).

In 1989 a new curriculum was defined for each cycle of basic education and for secondary education. The same year also saw the issuing of Decree-Law no. 115/98 of 4 May approving the regime of autonomous administration and management of schools of the 2nd and 3rd cycles of basic education and secondary education, a system which was also applied on an experimental basis in large schools in the 1st cycle of basic education (schools with over 200 pupils).

Educational support and supplements, aimed at allowing children to access, remain in and be successful at school, in particular during the period of compulsory education, have been regulated since 1990 in line with the provisions of the Comprehensive Law (with annual adjustments).

In 1990 also, general provisions were included in the Career Statute for Nursery School Teachers and Basic and Secondary School Teachers, relating to the whole professional life of teachers. This statute did away with the earlier legislation, which was dispersed among innumerable documents and lacked any clear line or uniformity.

In 1992 a new system of assessment of basic education pupils was included in the new curriculum organisation. This was further adjusted in 1994.

Since June 1996, schools have been allowed to set up classes with alternative curricula to those of regular basic education.

1997 saw the publication of legislation establishing a new system for providing educational support services in schools. In the same year, legislation was published under the joint responsibility of the Ministries of Education and of Qualification and Employment, allowing classes to be set up offering initial vocational education and training courses, in schools teaching 3rd cycle classes. These classes are aimed primarily at pupils who have already received their certificate of basic education, but who have no immediate intention of continuing secondary education studies.

1997 also saw the publication of *Despacho Normativo* (legislative act) no. 27/97 of 2 June which on an experimental basis was intended to set up sufficiently large networks of facilities to constitute autonomous management units with a view to the gradual decentralisation of the educational administration.

In 1998 a bill was passed that approved a new system of autonomy, administration and management of public institutions. This bill gave formal status to groups of nursery, basic and secondary schools.

This legislative measure, Decree no. 115/98, formally enshrines the groups of schools and defines them as an organisational unit with its own administration and management bodies, consisting of nursery schools and one or more levels of education, based on a common educational project aimed at achieving the following aims, among others: to favour a coherent and structured transition for pupils in compulsory education, to overcome situations of isolation, to prevent social exclusion and to boost the teaching capacity of the establishments involved.

In August 2000, *Despacho Normativo* no. 12/2000 was published that defines and sets the criteria for the creation of groups of public preschool and basic education establishments.

c) The general principles governing Higher Education are also established in the 1986 Comprehensive Law on the Education System. Following its publication, individual aspects were regulated, in particular the systems of autonomy of the establishments on this level of education, access, the systems of fees and welfare, and the status of private and cooperative higher education.

Legal texts published in 1988 and 1990 established the scientific, pedagogical, administrative, financial and disciplinary autonomy of the public universities and the higher polytechnic institutes. This principle of autonomy enshrines the right of higher education institutions to establish their own fundamental rules of internal organisation, in particular the ways they assess knowledge and test teaching experience, and the plurality of teaching methods.

The system of access to higher education, which has arisen out of the Comprehensive Law, has been the starting point of successive regulations relating both to its general aspects and to special systems. First of all the access system introduced in 1992 and revised in 1996 and 1997 establishes that access to public, private and cooperative higher education is based solely on the results obtained during secondary education and in the national secondary

education examinations in the specific disciplines legally established for each type of course at each type of establishment. This was followed in 1998 by a legal act that defines the general framework of the new system of access and entry to public, private and cooperative higher education institutions, to come into effect in the 1999/2000 academic year.

Legislation of 1998 also introduced changes to the regulations governing the special regimes, which had been in effect since 1993, with changes introduced in 1996.

The legal framework for higher education also includes the status of university teacher careers, with a legal basis going back to 1980, and that of higher polytechnic education, published in 1981, and the bases for the system of assessment and supervision of higher education, published in 1994 and, with further legal developments in 1997 and 1998, the year in which was created the National Council for Assessment in Higher Education (*Conselho Nacional de Avaliação do Ensino Superior*).

General trend/strategies

The main educational strategies/measures to appear in the 1990s were:

- the establishment in practice of 9 years' compulsory schooling (the principle established since 1986, in the Comprehensive Law);
- the creation and enlargement of the Educational Psychology and Guidance services;
- a new curricular concept for secondary education and a new regulatory framework for higher education (with prominence given to the autonomy of institutions and the expansion of higher polytechnic education, both private and cooperative, as well as the revision of the system of access to this level of education);
- the creation of Priority Educational Intervention Territories;
- the development of the Pre-primary Education Network;
- the creation of a new System of School Autonomy, Administration and Management;
- adult education and training;
- the design and application of inter-ministerial programmes (aimed at combating school drop-out phenomena);
- education in citizenship (including the dimensions of intercultural co-existence and protection of the environment).

1.3 Distribution of responsibilities for the organisation and administration of the education and training system

Education in general is the responsibility of the Ministry of Education and of the Ministry of Science and Higher Education, apart from some education establishments that may be supervised by or fall under the administration of other Ministries, although they are supervised with regard to pedagogical matters by the Ministry of Education.

The central authorities ensure the implementation of laws passed and decisions taken by the Government and Parliament, and develop additional decisions, instructions and notifications.

The Ministry of Education (*Ministério da Educação – ME*) is responsible for defining national policy on education and sport. Its duties are to promote the development and modernisation of the education system, to strengthen the link between education, research, science, technology and culture, to preserve and spread the Portuguese language and to promote the development of an integrated sports policy.

The Ministry of Education is responsible for the political direction of the Ministry, assisted by three Secretaries of State: Secretary of State for Higher Education; Secretary of State for Education and Innovation; Secretary of State for Educational Administration and the directors of the various departments and services of the Ministry of Education.

The central services of the Ministry of Education are as follows:

- Secretariat General (*Secretaria Geral – SG*);
- Office for Information and Assessment of the Education System (*Gabinete de Informação e Avaliação do Sistema Educativo – GIASE*);
- Financial Administration Office (*Gabinete de Gestão Financeira – GEF*);
- Directorate-General for Human Resources in Education (*Direcção Geral dos Recursos Humanos da Educação – DGRHE*);
- Inspectorate General of Education (*Inspecção-Geral da Educação – IGE*);

- School Sports Coordinating Office (*Gabinete Coordenador do Desporto Escolar*);
- Office for European Affairs and International Relations (*Gabinete de Assuntos Europeus e Relações Internacionais – GAERI*);
- Directorate-General for Curricular Innovation and Development (*Direcção-Geral de Inovação e Desenvolvimento Curricular – DGIDC*);
- Office for Educational Assessment (*Gabinete de Avaliação Educacional – GAVE*);
- Directorate-General for Vocational Training (*Direcção-Geral de Formação Vocacional – DGFV*);

Ministry of Science and Higher Education:

- Secretariat General (*Secretaria Geral – SG*);
- Directorate-General of Higher Education (*DGES*);
- Inspectorate General of Education (*Inspecção-Geral da Educação – IGE*);

The central services essentially deal with the design, development, coordination, evaluation and inspection of education and training.

The Ministry of Education takes decisions with regard to the general organisation of schools and basic and secondary education and issues guidelines on the content of pre-primary education and the curricula for basic and secondary education. Together with the Ministry of Labour and Solidarity, the Ministry of Education establishes curricula for the vocational schools.

The regional services are the five Regional Directorates of Education (*direcções regionais de educação – DRE*). These are decentralised services that carry out the instructions of the Ministry of Education at regional level with regard to the guidance, coordination and support of non-higher education establishments, the management of human, financial and material resources, school welfare systems, and supervision of physical education and school sport activities.

Administration at local level:

a) Educational area centres operate at the municipal or inter-municipal level in each DRE. Their task is to coordinate, guide and support non-higher educational and teaching establishments within their scope of action.

b) For pre-primary, basic and secondary education, a new system of autonomy, administration and management has been approved, which also applies to groups of schools.

Autonomy is the power given to the school by the education administration to take strategic, pedagogical, administrative, financial and organisational decisions within the framework of its educational project, which, together with the internal school rules and annual plan of activities, constitutes the process of school autonomy.

The educational project which formally defines the educational orientation of the school is drawn up and approved by the administrative bodies for a period of three years and must set out the principles, values, goals and strategies according to which the school proposes to fulfil its educational function.

The internal regulations define the system under which the school or group of schools will operate, together with its administrative and management bodies and the educational guidance and educational support structures and services, as well as the rights and duties of the members of the school community. The provisions on the electoral processes for these bodies are set out in the internal regulations. The internal regulations can be reviewed in the year following their approval, and any modifications deemed appropriate can be added. The bill which approves the system of school autonomy, administration and management establishes the following administration and management bodies:

The Assembly (*Assembleia*), the body responsible for defining the guidelines of the school activities, and in which the educational community participates and is represented.

The Executive Management (*Direcção executiva*), consisting of an executive board or a head teacher, is a collegiate or single-person body, which has management responsibility for either a school or group of schools, as defined in the respective internal regulations.

Pedagogical Council (*Conselho pedagógico*) – the body coordinating and providing the educational direction of the school, in the teaching and didactic areas.

Administrative board (*Conselho administrativo*) – the body that discusses and takes decisions on administrative and financial matters.

Once these bodies have been set up, they have to be installed and activated in the next school year. The results of the processes for the Assembly, the Executive Council or the Director

and for the School Coordinator are homologated by the respective Regional Director.

As regards Higher Public Education, universities and polytechnic institutes enjoy administrative, financial, academic and pedagogical autonomy.

There is no single management model for universities, but the management bodies of the faculties or equivalent units must include a representative assembly, a school board, a pedagogical council and a scientific council. The organising bodies of public universities are: the University Assembly, which elects the Chancellor and approves the statutes; the University Senate, which makes final decisions on the creation of university structures, development plans and budgets; and the Chancellor who oversees the university's academic, administrative and financial management. The University Assembly and the Senate consist of an equal number of representatives of the teaching staff and students, in addition to representatives of researchers and non-teaching staff.

Universities also have within their statutes councils of an advisory nature which provide an interface with the local economic, social and cultural community.

The administrative bodies of polytechnic institutes are: the Chairman, who superintends the institution's academic, administrative and financial management; the General Council, which approves the plan of activities and the proposals for the creation, alteration or closure of organisational units; and the Administrative Council, which prepares and allocates the budget.

Within the scope of their financial autonomy, higher education institutions are free to manage the annual funds the State grants them and to collect and manage their own funds.

In the autonomous regions of the Azores and Madeira, the administration of education is the responsibility of the regional governments through their respective Regional Secretariats of Education. They adapt national education policy to the region and also manage the human, material and financial resources.

The Ministry of Labour and Solidarity (*Ministério do Trabalho e da Solidariedade* – MTS) is responsible for defining and pursuing policies relating to employment, vocational training and social security. Its central structure, for the areas of employment and vocational training, incorporates the Directorate-General of Employment and Vocational Training (*Direcção-Geral do Emprego e Formação Profissional* –

DGEFP), the Institute of Employment and Vocational Training (*Instituto do Emprego e Formação Profissional – IEFPP*) and its Regional Directorates and the Institute for Innovation in Training (*Instituto para a Inovação na Formação – INOFOR*).

The DGEFP provides conceptual work and technical and legal support in the areas of employment and vocational training. The DGEFP's remit includes carrying out studies in cooperation with the Department of Evaluation, Forward and General Planning; undertaking applied research and developing the necessary opinions to permit the formulation of employment and vocational training policies; superintending various employment and vocational training measures; ensuring the coordinated evaluation of these measures and so contributing to the effectiveness of the European Social Fund; collecting and processing information on employment and vocational training measures from internal and international bodies.

The Ministry of Labour and Solidarity, through its Institute of Employment and Vocational Training (IEFP) and in collaboration with the social partners, is responsible for the apprenticeship system and for the job and vocational training centres. It also has joint responsibility with the Ministry of Education for vocational schools and runs a significant portion of the pre-primary establishments which depend with regard to pedagogical matters on the Ministry of Education.

Within the context of apprenticeship, the IEFPP runs the national apprenticeship committee (*Comissão Nacional de Aprendizagem – CNA*), composed of representatives of several ministries and the social partners. The CNA's remit includes studying and proposing policies and strategies for developing the apprenticeship system, in the light of the development of the education and vocational training systems, and also of the labour market.

The IEFPP is responsible for implementing the measures relating to employment and vocational training policy, particularly those resulting from programmes run within the European Community Support Framework (CSF) and the new vocational certification system. A tripartite executive committee is responsible for the management of the IEFPP. The Government and the social partners are also represented in the consultative committees and the regional bodies of the IEFPP.

The IEFPP's Department of Vocational Training is responsible for curricular development, designing and preparing training programmes, defining training profiles, trainers' training,

apprenticeship and the technical coordination of vocational training centres.

The Certification Department (*Departamento de Certificação*) is responsible for the application of the National Vocational Certification System (*Sistema Nacional de Certificação Profissional*). This tripartite-based system – public authorities, employers' associations and trade unions – includes in its structure a Committee for Vocational Certification (*Comissão Permanente de Certificação – CPC*), which coordinates the national vocational certification system and the Specialist Technical Committees (*Comissões Técnicas Especializadas*) for the individual sectors.

The Institute for Innovation in Training (*Instituto para a Inovação na Formação – INOFOR*), set up in May 1997, is the body which sets out, in the areas of employment and vocational training, to promote innovation in the areas of training, organisation and management of human resources, through research and the design and dissemination of innovative solutions in these areas.

The INOFOR's remit includes:

- Promoting research and designing the necessary tools for the understanding of future training skills and needs, and the direction in which these are trending;
- Defining the criteria for and assessing the quality of the training bodies, with a view to the balanced development of the training sector and the quality of the actions undertaken by it;
- Developing models, methodologies, programmes and instruments for training and training management, directed at specific target groups, and deriving from the priorities that have been established in terms of training policy and successful entry into working life.
- Promoting the development of research and research-action and giving greater impetus to new thinking and the exchange of experience on innovation in training, organisational models and human resources management.
- Cooperating in developing technical tools to support the technical management of the Community Support Framework/ESF programmes, in particular the criteria for the evaluation and selection of applicants and the system of technical-pedagogical supervision, with a view to improving the quality of the actions receiving support and the widespread dissemination of innovative solutions;

- Participating in the assessment, selection and supervision of projects and studies aimed at improving quality and promoting innovation in training and employment, in particular those developed under the Community Support Framework/ESF technical assistance programmes.
- Designing systems with which to assess skills already possessed or acquired in initial or continuing training, the certification (and equivalence) of these skills, and their interface with school education and vocational training systems.
- Contributing to perfecting the methods and operations which are necessary for the full operation of the observatories that have been set up in the areas of employment, training and entry into working life.

1.4 Inspection/supervision/guidance

The General Inspectorate of Education (*Inspecção Geral da Educação – IGE*) is responsible for the educational and technical supervision of all public and private education and teaching establishments. With the exception of public higher education, the Inspectorate is also responsible for ensuring proper distribution of all government funds and support for students. In addition, the Inspectorate has the task of monitoring the financial and administrative efficiency of the education system as a whole.

The Inspectorate is run by an Inspector General who is assisted by two Sub-Inspector Generals. It exercises its authority at central level through five coordination units covering the following areas:

- technical and pedagogical inspection of pre-primary education institutions, basic and secondary education;
- administrative and financial inspection of pre-primary, basic and secondary education;
- inspection of private and cooperative schools outside higher education, and of vocational schools;
- technical and legal assistance.

The Inspectorate also has regional delegations, which report hierarchically and functionally to the Inspector General. These are decentralised services responsible for the technical, pedagogical, administrative and financial

supervision of the education system in their respective areas.

The inspection of public, private and cooperative higher education establishments is the responsibility of the Ministry of Science and Higher Education.

1.5 Financing

The financing of public education is basically provided by Central Government, the Ministry of Education, the Ministry of Science and Higher Education and others, although local authorities have some responsibility.

Public education is essentially financed by the Ministry of Education and by the Ministry of Science and Higher Education, although the financing of some institutions is shared with other Ministries (in particular, the Military Academy and the Naval School, which are under the supervision of the Ministry of Defence and, as regards pedagogical matters, of the Ministry of Education and the Ministry of Science and Higher Education).

The Ministry of Education finances central and regional services through the allocation of funds, and finances private and cooperative education based on association contracts through budgetary transfers.

The regional administration of the autonomous regions of the Azores and Madeira finances educational services and establishments both out of their own resources and with the transfer of State funds.

The co-financing provided by the PRODEP (*Programa de Desenvolvimento Educativo para Portugal*, or Programme of Educational Development for Portugal), resulting from the European Community Decision of 18 June 1990, should also be mentioned. This programme provides financing and resources for training and innovation and the modernisation of educational infrastructure (construction and equipment of new classrooms, vocational education, higher education). The municipalities are responsible for financing in certain areas of education, in particular the construction, maintenance, equipment and certain logistical expenses of pre-primary establishments and the first cycle of basic education, and also provide complementary funding for school transport and extra-curricular and leisure activities.

Compulsory education is free as regards fees and other payments related to enrolment,

school attendance and certificates. In certain cases, pupils are also entitled to grants for books, school materials, transport, meals and accommodation. However, pupils in secondary and higher education and their families make a significant financial contribution to education through the payment of enrolment and tuition fees and the purchase of books.

In secondary education, the law states that economic support falls into two categories, general support measures and measures with restricted application.

The exemption from enrolment fees applies to all pupils who are included in the indicative tables of those parts of the population that qualify for the various forms of non-generalised support. The same system applies to study grants, the amount of which is also set by the level of study and the expenses to be covered.

In 1998 a regulation was approved establishing a system of merit grants to cover the expenses of secondary school pupils who attend public schools, or private or cooperative schools, under a partnership contract system, and who have shown academic merit but are considered to be economically disadvantaged. This takes the form of a top-up loan which is granted by credit institutions, under cooperation agreements with the specialised departments of the Ministry of Education.

It is the task of the higher education social support services, which have their own administrative and financial autonomy, to operate in each university, university-level institution or other higher education institution, and to provide various forms of assistance or services to higher education students who lack the necessary resources.

This financial assistance and providing these services involve: granting study grants and subsidies; providing financial loans; proposing to the respective higher educational institution that it waive or reduce study fees.

The Basic Law on the Financing of Public Higher Education was adapted in 1998, in the area of the support included under academic welfare action.

The study fees, in the still constant definition of the new legal framework for the financing of public higher education, are levied in return for the benefits that the higher education institutions make available to students.

The amount of the fee is independent both of the student's socio-economic level and the establishment or course frequented by the student. It is set every year, and constitutes the specific income of the higher education institution attended by the student.

The annual fee is equal to the one month's minimum national wage at the start of the academic year, and students who apply for study grants pay the fees only once a final decision has been taken on their application.

The Student Support Fund (*Fundo de Apoio ao Estudante*), which was set up as part of the legal framework for the financing of higher education, and the nature and responsibilities of which were defined in 1998, includes the academic financial and social support (*acção social escolar*) system at higher educational institutions.

The Fund's remit includes the appropriation of the budget lines intended for academic financial and social support as well as promoting, coordinating and supervising the system of loans for granting autonomy to higher education students.

Vocational training is financed by the State, through public, private and cooperative bodies, and out of national and international funds, and in particular out of Community and training funds.

Training bodies accredited by the INOFOR have access to ESF budget lines.

1.6 Advisory and consultative bodies

The following consultative/advisory bodies exist:

The National Council for Education (CNE), an independent higher advisory body of the Ministry, set up in 1992, which has autonomous administrative and financial powers. It is, responsible, both on its own initiative or when requested, for issuing opinions, reports and recommendations on all education issues, and particularly for ensuring the enforcement and development of the provisions set out in the Comprehensive Law on the Education System of 1986. It consists of approximately 60 members who represent the different organisations directly involved in educational, political and social sectors.

The Council for Private and Cooperative Education (CCEPC), which advises the Ministry of Education on measures to be taken to allow private and cooperative educational establishments to be included in the education system.

The Council for Higher Education – Industry Cooperation (CESE), whose purpose is to develop cooperation between industry and centres of knowledge, namely universities and

official research and development organisations, and to improve the technological base and the technical training of the labour force.

The National Council of Higher Education, which defines higher education policy.

The Higher Council for Science, Technology and Innovation, which defines the policy for science and technology.

The National Council for the Assessment of Higher Education, which carries out the assessment of the system.

The National Council for Social Action in Higher Education (CNASES), which is tasked with supervising or developing general welfare policy in higher educational institutions.

National Council of Secondary Education Examinations, which is chaired by a representative of the Ministry of Education and made up of representatives of the academic and pedagogical associations of those disciplines in which national secondary education examinations are held.

In addition, there is a System of Observatories (Observatory on the Entry into Employment and Careers of Higher Education Graduates (*Observatório sobre a Inserção e Percurso dos Diplomados no Ensino Superior*), the Permanent Laboratory for Higher Education (*Observatório Permanente do Ensino Secundário*) and the Observatory for Basic Education (*Observatório do Ensino Básico*)). These are recently created information systems intended to help manage the processes of change in the field of education.

In the vocational training area we find the following advisory bodies:

- The Inter-Ministerial Commission for Employment (*Comissão Interministerial para o Emprego – CIME*), attached to the MTS, has been working on proposals to establish a global policy for employment and vocational training, whatever the level of training. Its job is to coordinate vocational training, more specifically that provided by public administration departments.
- It coordinates vocational training, in particular training promoted by the departments of the public administration;
- The Social and Economic Council (*Conselho Económico e Social – CES*), which pronounces on the major options of economic and social policy.
- The Standing Committee for Social Consultation (*Comissão Permanente de Concertação Social – CPCS*), which signed

the vocational training policy agreement.

- The Committee for Vocational Certification (*Comissão Permanente de Certificação – CPC*), coordinates the national vocational certification system.
- The Employment and Vocational Training Observatory (*Observatório do Emprego e Formação Profissional – OEFP*) which has a consultative capacity on questions of educational policy and vocational training.

1.7 Private schools

Private and cooperative schools are set up and managed by private individuals acting individually or collectively. Private and cooperative schools which provide collective instruction in keeping with the objectives of the national education system are eligible for the same benefits as public schools.

Private and cooperative non-higher education:

Decree-Law no. 552/80 of 1980 published on 21 November establishes the Status of Private and Cooperative Education in the non-higher education area. This document states that the liberty of education is limited only by the public good, the general objectives of education and the agreements concluded between the State and the private educational establishments. Pupil and teacher mobility between the public, private and cooperative systems is secured.

Each private school can offer one or more levels of teaching, each of them constituting a complete cycle of studies. It may have its own educational plan, once it provides, at each level of teaching, overall education of equal value to the corresponding levels of State-provided education.

The regulations of schools having their own courses and curriculum should include rules governing enrolment or admission, the minimum age of attendance, standards for pupil attendance and criteria for the assessment of knowledge.

Private schools, within the framework of their educational objectives, can operate with pedagogical autonomy. Pedagogical autonomy consists of not being dependent on public schools with respect to: methodological direction and school instruments; curricula and programmes; assessment of knowledge; enrolment, issuing of diplomas and certification of enrolment, progress and professional knowledge.

Private and cooperative higher education:

The present status of private and cooperative education, as approved in 1994, sets out the conditions for the creation of institutions and courses, the granting of the respective degrees, and defines the intervention of the State in terms of the quality of the teaching administrated and

the possibility for financial support. The legal act in question seeks to reconcile the independence and autonomy of the institutions with the necessary supervision and intervention by the State in order to guarantee scientific, cultural and pedagogical quality.

2. PRE-PRIMARY EDUCATION (*Educação pré-escolar*)

Pre-primary education can be regarded as forming an integral part of the State education system, as laid down in the Law of July 1973 (Law 5/73), which defines its objectives and sets up training colleges for State nursery teachers. The first official nursery schools were set up by the Ministry of Education in 1978. However, it was only in 1986, with the publication of the Comprehensive Law on the Education System, that pre-primary education became a permanent part of the education system, with its generic objectives defined in terms of the balanced training and development of children's potential, to be undertaken in close cooperation with the family environment.

In 1995, the Ministry of Education developed a plan to expand the pre-primary education network in order to ensure greater coverage. It also defined the creation and maintenance of the system of financial support, as well as the pedagogical and technical criteria governing the establishment and operation of nursery schools. In 1996, the Ministry of Education adopted preschool education as the first stage of basic education and defined two strategic objectives: to give national visibility to infant education and to create conditions so that 90% of 5-year-olds have access to preschool education by school year 2000/01. In partnership with the Ministries of Solidarity and Social Security, together with the Ministries of Infrastructure, National Planning and Administration, the Pre-primary Education Expansion and Development Programme (*Programa de Expansão e Desenvolvimento da Educação Pré-Escolar*) was launched with the objective of developing proposals for pedagogical intervention in curriculum development and teacher training, and of promoting and supervising the launch of innovation, training and research programmes. In 1997, following the principles already laid down in the Comprehensive Law on the Education System, the Framework Law on Pre-Primary Education (*Lei Quadro da Educação Pré-Escolar*) was published. Law no. 55/97 defines this level of education as the first stage of basic education in the process of lifelong education. Under the terms of this Framework Law, pre-primary education can take various forms, which complement and interrelate to each other, in particular peripatetic infant education (*educação pré-escolar itinerante*) and community and child action. This law

established the legal framework for this stage of basic education and defined the system of general and pedagogical principles, and the organisational principles. The new legal framework gives expression to the following objectives: creation of a national pre-primary education network, incorporating both a public and a private network that includes private and cooperative establishments of preschool education and those that operate within private social solidarity institutions and within non-profit-making institutions; enshrining families' right to participate in the development of educational plans and objectives, defining the instruments of institutional cooperation between the various government departments involved in the Pre-primary Education Expansion and Development Programme; defining the organisation of pre-primary educational institutions as well as the conditions of the financial support framework.

In accordance with the 1986 Comprehensive Law on the Education System and the Framework Law on Pre-primary Education (Law no. 5/97), the overall objectives of pre-primary education are to develop the child's emotional stability, social, intellectual and motor skills and health habits and to seek to deal with the child's inadequacies, handicaps or precocious behaviour. Pre-primary education should complement the education provided by the family with which it must cooperate closely.

Decree-Law no. 147/97 of 11 June gives more substance to the Framework Law on quality preschool education through the creation of a national preschool education network, incorporating a public network based on an initiative of the central and local administration and a private network developed on the basis of the initiatives of institutions of private and cooperative education and of other non-profit-making institutions, with the objective of making pre-primary education universal. The groups are mixed in both types of establishments.

Although these objectives are common to all pre-primary institutions, in nursery schools under the Ministry of Education educational quality is predominant, whereas those under the MTSS give more importance to family support. The latter are established in larger buildings, often in social services centres, with larger numbers of children and staff, provide meals and benefit from other health services.

Pre-primary education is optional and is provided for children between the ages of three and six, the legal age for commencing basic education. Children of this age group generally attend nursery school (*Jardim de Infância*).

In State schools under the Ministry of Education, while preschool education as a whole does not make it possible to offer to all children of 3 and 4 years of age the possibility of attending nursery school in the public system, it gives priority to five-year-old children, i.e. those who are about to enter basic education and whose parents or legal guardians reside or work in the *freguesia* (parish) where the nursery school is located. In private social solidarity schools, social criteria are applied, according to the needs of families.

2.1 Organisation

There is a State network and a private network of nursery schools, both under the supervision of the Ministry of Education. These networks are complementary, and they are coordinated, monitored and supported by the Regional Directorates of Education.

The network of pre-primary institutions run by the MTSS through Regional Social Security Centres is made up of Private Social Solidarity Institutions (IPSS) and public institutions set up at the initiative of the MSST. The latter fall under the auspices of various other bodies, such as the Private Social Solidarity Institutions (*Instituições Privadas de Solidariedade Social – IPPS*), local authorities and cooperatives. Most of the State and private institutions under the supervision of the MTSS offer creches for children from three months to three years of age.

The two types of services (nursery schools and creches) may operate in the same building or separately.

According to the Comprehensive Law, pre-primary education is carried out either in distinct units or is included in school units offering the 1st cycle of basic education or in buildings where other social activities are carried out, in particular non-school education.

The legislation which has been in effect since 1997 defines pre-primary educational establishments as structures which provide services aimed at the educational development of small children and at providing support to families. They are required to offer a flexible operating timetable, in line with the needs of the

community of which they are part. These establishments may operate separately or be attached to basic education schools.

The groups are formed on the basis of pedagogical criteria and depend on the methods and principles defined by the pedagogical council (*conselho pedagógico*) of the particular school.

Where the structures of the schools permit, the classes must be organised according to age. At nursery schools run by the Ministry of Education, no more than 25 children can be assigned to one teacher, and for homogeneous groups of three-year-olds, no more than 20. Teachers usually change group every year.

Nursery schools under the Ministry of Education provide educational activities for five hours a day, divided into two periods, five days a week. The timetable may be increased by non-curricular or socio-educational activities.

The adoption of the school calendar for this level of education prior to the start of each school year is the responsibility of the pedagogical administration of the preschool education establishments in consultation with the local authorities and the parents or guardians.

Starting in the 1997/98 school year, public pre-primary educational establishments are gradually changing their timetable to remain open additional hours in response to families' childcare needs.

Nursery schools under the MTSS are open for 10 – 12 hours a day, five days a week, and most close for one month a year in the summer.

In establishments which are part of the public network, the educational component is provided entirely by the State. In the private solidarity or non-profit-making network, the State assumes a share of the operation of the institutions by paying all the costs of the educational component and pays some of the costs of the socio-educational and family support activities. In the private network, which is made up of private and cooperative establishments, the financing is provided by the families, and the establishments can request financial support for needy families.

2.2 Curriculum/Assessment

Curriculum development is the responsibility of the nursery school teacher and should take account of the general objectives of pre-primary education.

The Curriculum Guidelines (*Orientações Curriculares*) defined by the Ministry of Education, constitute the reference framework for all teachers in the national network. Their goal is to provide the children with a real learning opportunity, independently of the teaching model used by the particular pre-primary establishment.

These guidelines relate to the role to be played at nursery schools by expression through movement, and dramatic, visual and musical expression, learning the mother tongue and mathematics. The activities recommended, whether for individuals or in groups, comprise art, painting, modelling, story-telling and playing at "let's pretend", and are aimed at developing the child's independence, creativity and social skills. In some cases, pre-reading and pre-writing activities may be undertaken.

Throughout the year, at the end of each phase, the teacher assesses whether the objectives defined for the phase have been accomplished; how far the children have developed and what skills they have acquired; and whether the plan of activities needs to be reformulated so as to better ensure the emotional, social, psychomotor, perceptive, cognitive and moral development of the children. This assessment process should serve as a support for planning actions and activities to permit the educator to correct and adjust the educational process to the children's development.

Children move on to basic education at the beginning of the school year in which they have their sixth birthday. For children with special educational needs, it may be recommended that they stay on at nursery school beyond the legal age.

2.3 Teachers

Until the 1997/98 school year, the initial training of nursery teachers was the bachelor's degree (*Bacharelato*), obtained after three years' training at non-university institutions of higher education (*Escolas Superiores de Educação*).

In 1997 the legal foundation was laid for the specialised training of teachers, including nursery teachers. *Portaria* no. 413-A/1998 of 17 July made it compulsory for teachers to have the "licenciado" level diploma (5 years of higher education). The training must also include

appropriate social, personal, cultural, scientific, technological and artistic training, educational sciences and teaching practice. There are also training colleges that offer a wide range of specialised training.

Teaching staff is expected to work 35 hours a week during term time. Teachers' weekly timetables include 25 hours' teaching plus a non-teaching component, spread over five days a week.

In establishments under both Ministries, auxiliaries may be provided. Auxiliary staff may have various types of training, but they must have completed compulsory schooling.

The in-service training requirements for nursery teachers are the same as those for basic and secondary education teachers.

Teachers in State schools are civil servants.

2.4 Statistics

Pre-Primary Education 2002/2003

		No of schools	No of teachers	No of children
Ministry of Education	Public	4167	7308	112621
	Private	853	2675	43034
Other ministries	Public	86	365	5294
	Private (IPSS)	1171	4002	74259

3. COMPULSORY EDUCATION/TRAINING (*ENSINO BÁSICO*)

In accordance with the Comprehensive Law on the Education System, basic education is universal, compulsory and free for all children from 6 to 15 years of age who have reached the age of six by 15 September of the first school year (1st year of the 1st cycle) and lasts 9 years. Admission to the following cycles (2nd and 3rd cycles) depends on pupils' successfully completing the previous cycle.

Basic education can be provided in public, private or cooperative schools.

In basic education, there are no entrance or enrolment or attendance fees, and no charge is made for report cards or school insurance, or for educational guidance and psychology, school welfare or school health.

General educational support (school meals, school transport, and accommodation schemes) is provided to more needy pupils as a priority. School books and other school materials, together with direct financial assistance, are provided only to the most needy pupils. Depending on the family's socio-economic situation, this support is free or subject to a contribution. The expenses of family support schemes in private and cooperative schools may be borne by the State.

The objectives of basic education, set out in the 1986 Comprehensive Law on the Education System, are to provide general education for all pupils; to ensure that theoretical and practical knowledge, schooling and everyday life are interrelated; to provide physical and motor development, encourage manual activities and promote artistic education; to teach a first foreign language and begin a second; to provide the basic knowledge that will enable pupils to continue their studies or to be accepted on vocational training courses; to develop knowledge and appreciation of the specific values of Portuguese identity, language, history and culture; to develop independent attitudes; to provide children with specific educational needs with suitable conditions for their development; and to create conditions that will encourage the school and educational success of all pupils.

Continuing this approach, which tends to strengthen schools' role as a centre of educational activity, legislation was published in

1997 establishing a new system for the provision of educational support services in educational establishments.

Also with a view to ensuring effective equality as regards access and attainment opportunities for all pupils in compulsory education, schools have been allowed since June 1996 to set up classes with alternative curricula to those of basic education. The objective is to offer a diversified educational provision, appropriate to the needs of each group of pupils. Legislation published in 1997 established the transitional system to be observed during the 1997/1998 academic year for the reorganisation of the school network and the grouping of schools. This was followed in 1998 by Decree-Law 115/98, which defines the new system of school autonomy and management.

Basic education is divided into three consecutive cycles:

- first cycle, which lasts for four years (6 to 10-year-olds);
- second cycle, which lasts for two years (10 to 12-year-olds);
- 3rd cycle, which lasts for three years (12 to 15-year-olds).

Movement up through the three cycles depends on progress, and each cycle complements and deepens the previous one, within one single global perspective. The general organisation of the education system, as defined by the Comprehensive Law, entailed a review of the criteria and regulations of the school network as well as the type of school buildings that were built until then. *Despacho Normativo* no. 33/ME/9 defines the new type of establishments.

With the defining of new types of school buildings and in accordance with the principle set out in the LBSE, the buildings were no longer linked to one single level of education. Therefore, we find the following types of schools:

1st cycle of basic education (ages 6 to 10); 1st cycle schools with nursery school (ages 3 to 10); 2nd and 3rd cycle basic school (ages 10 to 15); integrated basic school – 1st, 2nd and 3rd cycles (ages 6 to 15); integrated basic school plus nursery school (ages 3 to 15).

In line with the provisions of the Comprehensive Law on the Education System, another form of relationship between the various cycles of basic and pre-primary education, that of educational regions for priority support, was introduced on an experimental basis from 1996/97. These educational communities combine the three cycles of basic education with other educational areas, as well as psychological support, guidance, welfare and health services.

3.1 First cycle

In the State, private and cooperative sectors, teaching at this level is provided by mixed schools (basic schools 1st cycle). As mentioned above, children who are six years old by 15 September – and, as an exception, those reaching that age by 31 December – may begin this cycle. Priority is given to older children when filling school vacancies.

The 1986 Comprehensive Law on the Education System defines the main objectives for the 1st cycle as: the development of oral language and the introduction and progressive mastery of reading and writing, the basic concepts of numbers and arithmetic, knowledge of the physical and social environment, and visual, dramatic, musical and motor expression.

Classes are organised by first and foremost by psycho-pedagogical criteria. Teaching is of a global nature and a given class of pupils is taught by a single teacher throughout. Other teachers may assist in specific areas.

There is no set organisation of class time (duration of a lesson and allocation of time to subject areas). Teaching time is managed by the teacher, taking into account the characteristics of the group, the school timetable and the breaks agreed by the School Council (*conselho de escola*).

The timetable depends on the availability of space in school buildings. One of the two weekly 25-hour schemes (including break times) may be adopted, from Monday to Friday. In the normal scheme (always compulsory, except when there is a shortage of premises), morning classes usually start at 9 a.m. and finish at 12 noon. In the afternoon, classes usually start at 2 p.m. and finish at 4 p.m.

In the two-session system (adopted only if there are not enough rooms to accommodate all the classes in certain schools), school starts at 8 a.m. and finish at 1 p.m. (morning session). In the afternoon session, courses start at 1.15 p.m. and finish at 6.15 p.m.

The duration of the school year is fixed annually by the Ministry of Education. After the summer holidays (around 10 weeks), schools in Portugal reopen around the second fortnight of September. The school year generally ends around the end of June.

Curriculum

The new curricular plans and programmes for the 1st cycle, which were introduced experimentally in the 1989/90 school year, are now in general application.

The curriculum is composed of the following compulsory subject areas:

- Expression: artistic and physical/motor;
- Environment studies;
- Portuguese language;
- Mathematics;

Optional subject-based curricular area

- Moral and religious education

Non-subject-based curricular areas (personal and social training):

- Project area
- Accompanied study
- Civics.

Project area: the objective of this curriculum area is the acquisition of knowledge through multi-disciplinary activities and projects. This is achieved by establishing a connection between the school and the environment and pupils' personal and social development.

Schools also organise extra-curricular activities, which are optional and are predominantly play-oriented and cultural in nature, aimed at the creative and formative use of pupils' free time, including school sports.

All these subject areas are included in the curriculum in each year of the 1st cycle, but at different levels.

Depending on the resources available, schools may begin teaching a foreign language, either orally or in a 'play' context.

School textbooks are produced commercially, but the Ministry of Education may be involved in the publication of compulsory course materials. 1st-cycle textbooks are valid for a minimum of four years.

3.2 Second cycle

The second cycle of basic education is provided in public or private education establishments (*Escolas Básicas 2º e 3º ciclos, Escolas Básicas 1º e 2º ciclos, Escolas básicas integradas*) and through media-based schools at basic education level (distance learning). These schools offer an alternative for children who live in remote localities and who do not have access to direct education. Nonetheless, direct education is always considered to be preferable.

The gradual demise of these educational establishments is regulated by *Despacho Conjunto* no. 15/SEAE/97 of 26 May and will take effect once the number of media-based schools has decreased significantly as a result of improvements in accessibility and depopulation of the regions of the hinterland.

Pupils who have successfully completed the 1st cycle, at a minimum age of nine and a maximum age of 15, are admitted to the 2nd cycle of basic education. They have to attend the educational establishment in the area where they live or of the place of work of the parents and/or those responsible for their education.

The objectives for the 2nd cycle relate to the teaching of the humanities, art, sports, science and technology and moral and civic education. The aim is to enable pupils to assimilate and interpret information creatively and critically so as to equip them with the methods, means and knowledge to pursue their education. This should also lead to an awareness of the community and its problems.

The Pedagogical Council (*conselho pedagógico*) takes into account the specific conditions of the school and the individual needs of pupils, giving priority to pedagogical criteria when deciding on the organisation of classes. In general, classes are mixed and comprise pupils aged 10 to 12 and 12 to 14. Care is taken to maintain the group/class of the previous school year, provided the Class Council does not advise otherwise. Pupils repeating their studies have to be integrated into classes of the same, or nearest, age level. The number of pupils per class varies from 24 (preferred number) to a maximum of 30. Up to four pupils with physical or mental disabilities can be integrated into each class, but these classes cannot then have more than 20 pupils.

The 2nd cycle operates on a multi-teacher system, with one teacher for each subject or combination of two subjects. It is desirable, but not compulsory, for pupils to be taught the same subject by the same teacher throughout the cycle.

The weekly timetable comprises 30 or 31 lessons lasting 50 minutes each. The school timetable is organised between Monday and Friday, or Saturday if the School Board so decides. The annual total number of hours of teaching is the same in both systems, as the teaching not given on Saturdays is distributed over the other days of the week.

Curriculum

The curriculum, which is compulsory for all pupils, is organised into five multidisciplinary areas and one non-subject curricular area – the ‘school area’.

The subject areas are:

- language and social studies: Portuguese language, Portuguese history and geography, and a foreign language (German, French or English);
- exact and natural sciences: mathematics and natural sciences;
- artistic and technological education: visual and technological education and musical education;
- physical education;
- personal and social education (optional): personal and social development or moral and religious education (Roman Catholic or other denominations).

Non-subject-based curricular areas (personal and social training):

- Project area
- Accompanied study
- Civics

The ‘project area’ comprises multidisciplinary activities and projects which aim to enhance learning, to make pupils aware of the connection between the school and the environment and to contribute to their personal and social development. It lasts for 95-110 hours per year, with a corresponding reduction in lesson hours devoted to the subjects involved in each project, and is run independently by the schools.

There are also extra-curricular activities which are optional and predominantly play-oriented and cultural in nature, aimed at the creative and formative use of pupils’ free time. School sports are included these activities.

Textbooks are valid for a minimum of four years.

3.3 Third cycle

In accordance with the legislation in force, the 3rd cycle of basic education marks the end of the nine years of compulsory schooling.

The 3rd cycle of basic education comprises three years of study, the final year constituting the end of the nine years of compulsory basic education (for pupils who enrolled for their first year of schooling in the 1987/88 school year or after).

This cycle is followed in integrated basic schools, in 2nd and 3rd cycle basic schools and in secondary schools, insofar as this is the most effective use of the resources.

Evening courses are also offered, but these follow a different model.

Pupils who have completed the 2nd cycle or its equivalent can enter the 3rd cycle of basic education. They have to attend the educational establishment in the area in which they live or of the place of work of their parents or those in charge of their education.

This cycle has the following specific objectives:

- a the systematic and differentiated acquisition of modern culture, in its humanistic, literary, artistic, physical, sports and technological aspects, all of which are essential for entering working life and for continuing studies;
- a educational and vocational guidance, so as to facilitate the choice between further education or entering working life, whilst respecting individual achievement.

This cycle is organised to the same general criteria as the 2nd cycle. It operates on a multi-teacher system, with one teacher for each subject. The classes are mixed.

The pupils' weekly timetable comprises 30 or 31 lessons. Each lesson lasts 50 minutes.

The school year is the same as in the 2nd cycle.

Curriculum

The new curricular organisation and management of the 3rd cycle are developing in phases alongside different curricular plans until school year 2004-05.

Subject-based curricular areas:

Portuguese language, foreign language (I and II – French, English, German or Spanish); history and geography, mathematics, natural sciences,

physics-chemistry, visual education, another subject offered by the school, physical education, technological education and introduction to the ICT.

Non-subject-based curricular areas:

Project area, accompanied study and civics.

The multidisciplinary areas, allowing pupils a choice, are:

- Personal and social education
- Moral and religious education (Roman Catholic or other denominations);
- Optional area, which involves a choice between a second foreign language, music and technological education.

There is also a 'school area' which, within this cycle, lasts 95-110 hours a year and entails a corresponding reduction in the teaching time devoted to the subjects involved in each project. In this cycle, the 'school area' includes civics (participation in the democratic institutions). The assessment of each pupil in this subject area is taken into account for the awarding of the basic education diploma. This subject is organised independently by schools.

There are also extra-curricular activities which are optional and predominantly play-oriented and cultural in nature, aimed at the creative and formative use of pupils' free time. School sports are incorporated into these activities.

Textbooks are valid for a minimum of three years.

3.4 Assessment/certification/guidance

The assessment of pupils in basic education is regulated by *Despacho Normativo* no. 30/01 of 19/07.

As an inherent part of education, assessment is continuous and systematic and focuses on the attainment of the general objectives of each of the cycles and the objectives of each subject or subject area.

In addition to the school bodies, pupils and parents, the assessment process involves the following services: psychological and guidance services, special education services and other services at the request the Pedagogical Council or school board.

Pupils in basic education undergo a formative, summative, standardised and specialised assessment.

Formative assessment (*avaliação formativa*) is the joint responsibility of the teachers who actually teach the pupils concerned and the other teachers. In the 2nd and 3rd cycles, the class director (a teacher chosen by the executive director from among the teachers of a particular class) is responsible for coordinating the assessment, ensuring its global and integrated nature.

Formative assessment is descriptive and qualitative, and is based on comprehensive information gathered by teachers relating to the various areas of learning. It is intended to inform pupils, parents, their teachers and others concerned of the quality of the teaching and learning processes and the extent to which curriculum objectives have been achieved. It is also intended to help teachers in their choice of methods and materials. The formal decision on formative assessment is taken at the end of each school term, at an ordinary meeting of the School Council in the 1st cycle or of the Class Council in the 2nd and 3rd cycles. During the school year formative assessment is the responsibility of the teacher in the 1st cycle and in the 2nd and 3rd cycles of the Class Council.

Summative assessment (*avaliação sumativa*) is the responsibility of all the teachers and educational experts who are part of the school board or of the Class Council. The assessment is based in the 1st cycle on the general criteria defined by the school board and by the Pedagogical Council in other cycles. Summative assessment is also decided at a meeting of the school board (in the 1st cycle) or by the Class Council (in the 2nd and 3rd cycles). The meeting can decide to adopt or reinforce educational support measures. The decision is normally taken at the end of each school term and at the end of each cycle, but not before the end of second year. This assessment, which takes place at the end of each cycle, is aimed at comparing the overall development of the pupil with the overall objectives of this cycle (the national minimum curricular objectives defined by the Ministry of Education and the objectives defined in each educational establishment).

The summative assessment consists of an overall evaluation of what the pupil has learned. The summative assessment made in the 1st cycle is internal and descriptive, and in the 2nd and 3rd cycles it is expressed in marks on a scale from 1 to 5, and is expressed in a descriptive form in non-subject-based curricular areas, accompanied by a summary of the descriptive comments entered in the school records as part of the formative assessment process. For the purpose of moving from one class to the next, the end-of-year summative assessment is expressed in the words "Not satisfactory", "Satisfactory" or "Very satisfactory". This

assessment takes place at the end of each cycle at which time it is decided whether the pupil passes or fails. In the latter case, the pupil repeats the year. Pupils may repeat the entire year or follow a specific support plan incorporating the subjects or subject areas in which they have not achieved the minimum objectives.

At the end of the second term of any school year, the competent assessment bodies may make an extraordinary summative assessment of pupils not promoted that year. This provides for a recovery plan for the pupil through educational support measures. The summative assessment at the end of the 3rd cycle takes the form of global written examinations, which take as their reference point the 3rd cycle curriculum.

The standardised assessment (*avaliação aferida*) does not affect pupil's progression within the school and is aimed at measuring the extent to which the minimum curriculum objectives defined at the national level have been fulfilled for each cycle of basic education.

Until school year 2004-05, the summative assessment, which takes place at the end of the 9th year of education, also includes overall class tests.

Specialised assessment is necessary in the course of a summative assessment when a pupil who has already been kept back in any school year does not have the necessary capacity to continue. It is carried out at the request of the school board (1st cycle) or at the request of the Class Council (2nd and 3rd cycles) by teachers and other education experts, following consultation with the pupil's parents, and must be based on a specific educational support plan to be implemented during the following school year.

Pupils who obtain a pass in the final summative assessment in the 3rd cycle are deemed to have completed basic education and are awarded a basic education certificate (*diploma do ensino básico*) by the administrative body of the school attended (State or equivalent private or cooperative), without any final examination.

Pupils who have reached the age limit for compulsory schooling (15 years) without completing the 3rd cycle may receive a certificate of completion of compulsory schooling. Such pupils can apply for the basic education certificate by sitting examinations held by schools for external pupils (*aluno auto-proposto*), with the school providing specific support whenever possible.

Guidance is provided by the counselling and guidance services. These are specialist educational support units incorporated into the

school network, which operate out of individual schools or cover school areas. In the 1st and 2nd cycles, guidance is predominantly psycho-pedagogical, while in the 3rd cycle it includes educational and vocational guidance.

3.5 Teachers

1st cycle teachers are multidisciplinary, and education at this level is global, under the responsibility of a single teacher who can be assisted in specialist areas. All teachers in the 2nd and 3rd cycles of basic and secondary education are subject specialists.

The courses for teachers in the 1st and 2nd cycles last four years and lead to the "licenciado" level diploma.

According to the new draft of the Comprehensive Law, which was legally established in 1997, nursery school teachers and 1st, 2nd and 3rd cycle teachers now train in non-university institutions of higher education, whereas secondary school teachers are trained in university institutions. Following this change, a legal act of 1998 defines the conditions in which secondary school teachers can obtain a *licenciatura* degree.

Courses for 3rd cycle and secondary teachers last five or six years and lead to a *licenciatura* degree.

All courses include academic and pedagogical training and teaching practice.

State teachers are civil servants. Teachers can gain access to the profession on the basis of their qualifications and experience.

The number of in-service training units considered to be a minimum requirement for career progress is equal to the number of years the teacher is required to remain at each salary scale. The annual average number is four credit units, each corresponding to a minimum of six hours.

3.6 Statistics

Basic education 2002/2003

		No of schools (a)	No of teachers	No of pupils
TOTAL			110418	1061545
Basic education	1st cycle	8582	35603	464697
	2nd cycle	1324	b) 33783	251360
	3rd cycle	1267	41032	344940
Level 2 courses in Vocational Schools		15	X	548

- a) Institutions providing more than one type of course are counted separately each time
- b) b) Also provide 'second chance' education
- c) c) See under "Secondary Education" below

4. POST-COMPULSORY SECONDARY EDUCATION (*Ensino Secundário*)

On completion of compulsory schooling, pupils may opt for one of three different types of courses:

- general courses, which give access to further studies at higher education level
- technology courses, which give access to training to enable the student to enter the labour market
- art education courses.

The general courses and the technology courses are divided into 4 groups, according to the field of scientific knowledge. The curricula of the secondary-level general courses are divided into 3 training components: general, specific and technical/artistic.

Permeability between the secondary-level general courses and the secondary-level technology courses is guaranteed by the Comprehensive Law on the Education System.

4A General Secondary Schools

The new model for the organisation of normal secondary education was first applied in some schools, on the basis of the teaching experience acquired, in 1990/91 and was generalised as from the 1993/94 school year.

This type of education lasts for three years (age range: 15 to 17 years) and is organised in a single study cycle covering the 10th, 11th and 12th years of schooling.

Pupils who have successfully completed basic education or the equivalent (9th year of schooling) have access to any secondary school course. Access to the Specialist Art Schools (*Escolas Especializadas do Ensino Artístico*) in dance and music require prior practice and experience. Pupils normally enrol at a school in the area where they live.

In terms of general objectives, normal secondary education aims to consolidate and deepen the knowledge acquired in basic education and to prepare young people either

for further studies or for employment.

On the basis of this objective, two different types of courses are organised:

- General courses (*Cursos Gerais – CG*): Secondary courses predominantly leading to further studies.
- Technology courses (*Cursos Tecnológicos – CT*): Secondary courses predominantly oriented towards the world of work and employment.

Specific training is common to both types of courses: general and technology courses. Pupils can change from one course to another. All post-compulsory secondary schools must provide both types of courses (general courses and technology courses), although one of them may predominate, depending on the rational use of human and material resources.

4A.1 Organisation of the school

General secondary school courses are provided in public secondary schools, and also in private and cooperative schools.

The education offered by secondary schools must be multicurricular, i.e. they must simultaneously offer general courses and preparatory courses for working life so that in each region the widest possible range is guaranteed taking into account local and regional conditions.

The size criteria for secondary schools are based on four models, as shown in the following table:

Class size	Pupils	Average space per pupil	Average surface area per pupil
18 to 30	540 to 900	8 – 8.5 m ² /pupil	24 m ² /pupil

Secondary schools with classes of between 36 and 39 pupils simultaneously offer general courses and technology courses in the 4 groups.

Even if the main thrust of the development of the school network is to make a clear differentiation

between basic and secondary schools, teaching establishments combining basic and secondary education may continue to function (whenever the use of already installed resources justifies this).

As in basic education, classes are organised by age group, taking into account the need to maintain the group/class from the previous school year, to ensure a numerical balance of the sexes and to integrate up to four pupils with special needs (in a regular class of up to 20 pupils).

In secondary education, the maximum preferred value as regards the number of pupils per class has been set at 30. The situation of pupils who use school transport must be taken into account in the timetabling.

The methodological orientations differ from one discipline to the next and the respective curricula. They are specified in the Curriculum Management Orientations (*Orientações de Gestão do Programa – OGP*).

In each school the “subject delegate”, that is, the teacher responsible for the orientation and coordination of the subject group, defines the methods to be followed, in line with the decisions arrived at jointly by all the teachers of the subject group, taking the OGP as their reference framework.

In terms of the organisation of school time, the weekly timetable of the general secondary education classes varies between 28 and 33 periods in years 10 and 11, and between 23 and 30 periods in the 12th year of schooling.

The length of the school year, which begins in the second fortnight of September and ends at the end of the second week of June, is defined by an Order published annually by the Ministry of Education. Within this calendar it is the individual schools that set the dates for the assessment meetings, the publications of gradings, enrolment and the internal school examinations.

4A.2 Curriculum

In terms of content, secondary school courses (CG and CT) are organised into four subject groups, according to the different branches of study:

- Scientific and natural;
- Arts;
- Economic and social sciences;
- Humanities.

Each of these main branches includes a general course primarily leading to further studies (CG) and various technology courses (CT) representing the major technological areas. The curriculum for the two types of courses comprises three training components: general, specific and technical/artistic. It also includes the ‘school area’ and (optional) extra-curricular activities.

General education is common to all *Cursos Gerais* (CG) and *Cursos Tecnológicos* (CT) and is compulsory for all pupils.

It covers the following subjects: Portuguese, introduction to philosophy, foreign language (two), physical education, personal and social development or moral and religious education (Roman Catholic or other denominations).

Specific education includes two or three compulsory subjects which are common within the same branch of the CG or the CT. These core curricula ensure interchange between the two courses and enable pupils wishing to continue their studies to do so. In the CG, pupils may choose additional subjects, up to the limit of the time available.

The aim of technical education, particularly in the CT, is the acquisition of skills that will enable young people to access a wide range of vocational activities and sectors. It is a polyvalent curricular component which is divided into two main areas: technology and art.

In the CG it lasts for six hours a week each year, divided into one or two technological or art subjects from which pupils are free to choose, depending only on what each school offers. In the CT, technical education covers a group of subjects, closely linked with the specific education component, according to the qualification objectives of each course.

It is planned that the schools themselves will organise various seminars, work experience and training courses etc. at the end of this component.

The number of hours spent on General Education is the same for both courses (CG and CT). The number of hours spent on Specific Education is higher in the General Courses, whilst more time is spent on Technical Education in the Technology Courses.

The school area is again an interdisciplinary area, organised and run by the schools, and is compulsory.

In addition to the curricular activities, education establishments are required to organise extra-curricular, play-oriented and cultural activities, which are predominantly held outside school time and are optional.

The curricular programmes and corresponding school textbooks are valid for at least three years. Textbooks are produced commercially but the Ministry of Education may be involved. Although the pupils' and teachers' right to resort to other sources of information is respected, textbooks for each subject are selected by the Pedagogical Council of each school.

A process of revision of educational curricula and assessment is under way in secondary education. Based on a wide-ranging national consultation, its objective is to arrive at a national curriculum that is strongly centred on the acquisition of basic cross-curricular skills in all courses and directions, and which at the same time is more open to the diversification of training programmes, in order to provide technological and technical training which is relevant to today and produces highly employable school leavers.

Five main ways of revising the secondary education curriculum are being pursued: fixing the number of lessons at a maximum of 30 a week; creating cross-curricular projects; reorganising the General Courses (CG) in order to better integrate the theoretical and practical dimensions; reorganising the Technology Courses (CT), with an accent on their vocational training aspect; differentiating the curricula of the different disciplines, depending on whether they are being taught as part of general (CG) or technological (CT) courses.

For General Secondary evening courses, the reader is referred to chapter 7.

4A.3 Assessment/certification/guidance

Assessment:

The assessment system in secondary education takes three forms:

- Formative assessment: This assessment, which is carried out by the teachers, working together with the guidance and educational support bodies, is aimed at informing pupils, education managers, teachers and other parties involved about the development and the quality of the educational process. This form of assessment is descriptive and qualitative in form and

contributes to establishing intermediate objectives which promote pupil's educational success, to the adopting of differentiated methodology, to promoting appropriate means of educational support; and to redirecting pupils with regard to their curriculum options.

At the start of the 10th year, the school management body may decide to carry out tests, in any discipline, with a view to providing the basis for catch-up measures.

- Summative assessment:

a) Internal assessment is undertaken jointly by the teachers in the Class Council, and is aimed at informing individual pupils and the person responsible for their education on how far the objectives of the curriculum have been met, and to provide a basis for decisions on the pupil's further educational path. One of the elements of this assessment which is used in classifying pupils in each discipline is a global written examination, which is taken at the end of the 10th and 11th years. Identical examinations are carried out in year 12, but only in practical subjects which are not examined at the national level.

The global written examinations are prepared by the subject group teachers in each school, following the criteria approved by the Pedagogical Council.

For the purposes of internal assessment, the Class Council meets at the end of each academic term, in order to decide on the grade to be given to each pupil in each discipline.

The final grade for the year in each discipline is the weighted average of the continuous assessment and of the global examination.

In school year 2002/2003, the overall tests ceased to be compulsory. However, if schools so decided, they could continue these tests to assess the pupil's level of knowledge and preparedness for the national examinations.

b) External assessment: This assessment, which is carried out by the Ministry of Education, is aimed at contributing to the homogeneity of secondary education grading, enabling pupils to conclude this level of education with their respective grades.

General course pupils take final examinations in the general and specific training disciplines of the 12th year, with the exception of physical education, personal and social development or moral or religious education (Roman Catholic or other denominations).

The final grade in the disciplines which are examined nationally is the weighted average, rounded to the nearest whole number, of the grade obtained in the final internal assessment

of the discipline in question and the grade obtained in the final examination.

Pupils are considered to have passed when they gain pass grades in all their course subjects. The final grade of a secondary education course is the simple arithmetic average, rounded to the nearest whole unit, of the final grades in all the disciplines in the respective curriculum, with the exception of moral and religious education.

The result of the assessment in either form is expressed, in each discipline, as a grade on a scale of 0 to 20.

Standardised assessment:

Standardised assessment is aimed at measuring the degree to which the curriculum objectives set for any discipline in the curriculum have been attained. This assessment can be carried out at the local, regional or national level.

The examinations are prepared by the Ministry of Education.

This form of assessment, which can take place at any time in the year, does not impact pupil's grades or progression.

Transition/Certification

The assessment carried out at the end of the 3rd term leads to the pupil passing into a higher class or not at the end of the school year. The Class Council is required to produce recommendations for compensation measures, support, and additional teaching, where this is justified.

The final grade for those disciplines in which national examinations are held is the weighted average of the grades obtained in the internal assessment for the years in which the subject was taught, and the grade obtained in the final examination.

Each year, pupils are considered to have passed when they obtain a final grade of 10 or more in each of the year's subjects, or in all except two.

The final grade of a new-style secondary education course is the simple arithmetic average, rounded to the nearest whole unit, of the final grades in all the disciplines in the respective curriculum, with the exception of moral and religious education.

Pupils who successfully complete their secondary education receive a certificate (*diploma de estudos secundários*) specifying the courses completed and the final grades obtained. Those completing technology courses also receive a level III vocational qualification certificate (*diploma de qualificação profissional*).

Guidance

Educational support measures are available to pupils who, demonstrating learning difficulties, are interested in such measures, have attended school regularly, and who have not cancelled their registration in the discipline in question.

The support measures can take the form of additional, diversified teaching support throughout the year, or an intensive, diversified teaching support programme after the end of regular 3rd term classes.

The educational and vocational guidance for secondary school pupils is provided, under the terms of prevailing legislation, by the psychology and guidance services which have been gradually introduced into the various schools or groups of schools at this educational level.

These services have a permanent technical team, consisting of a variable number of persons as defined by Ministry of Education Official Communication. The team can include: a) psychologists; b) teachers specialising in educational and vocational guidance (guidance counsellors), c) welfare officers.

These services provide psycho-pedagogic support to all members of the school community (pupils, teachers, parents or those responsible for children's education, auxiliary staff, etc.), assistance with the development of relationships within the educational community; and educational and professional guidance.

The action programme of each service should be included in the school's annual plan of activities, which in turn is approved by the competent management body.

The psychologists working in the guidance services hold career psychologist positions. These positions were created in 1997 by the Ministry of Education. In filling guidance counsellor posts, priority will be given to teachers which have successfully passed the specialist guidance counsellor (*perito-orientador*) courses given by the Vocational Guidance Institute (*Instituto de Orientação Profissional*).

4B Vocational school courses

Vocational schools were set up under Decree no. 26/89 of 21 January within the framework of non-higher education. This Law was done away with by Decree no. 70/93 of 10 March. In order to combat certain weaknesses, Decree-Law no. 4/98 of 8 January once again took up the challenge of vocational education and consolidated the position of vocational schools as educational institutions. This Law was aimed at reinforcing the role of vocational education as a special branch of education aimed at providing a structure and educational qualifications in the field of vocational training for young people. At the same time, it aims to introduce into the education system a fully-fledged education path which offers an alternative to mainstream secondary education.

Vocational Schools set out to a) contribute to the overall education of young people, providing them a sufficient basis for exercising a qualified profession; b) develop mechanisms for bringing schools in closer contact with the working world, more especially in the form of economic, professional, voluntary, social and cultural institutions; c) facilitate pupils' contacts with the world of work and vocational experience, preparing them to enter work and society; d) promote, together with other local players and institutions, concrete projects for training human resources qualified to meet the needs of the overall development of the country, in particular at the regional and local level; and e) provide pupils with a solid general, scientific and technological training, both for entering working life and for continuing their studies.

The Vocational Schools (*Escolas Profissionais-EP*) offer a variety of courses which, despite their ultimately differing ends, can be grouped into 17 training areas.

Vocational courses last for 3 academic years, equal to at least 2900 and no more than 3600 hours of training, and include the following training components: socio-cultural, scientific, technical, practical, artistic and technological.

These vocational courses are organised on the same model as all secondary education courses, and include a mandatory period of work experience (in the form of a placement) in the particular vocational area.

Vocational Schools can also organise other educational and training courses and activities, such as vocational courses in the arts for students who have completed the second cycle; "second chance" (*ensino recorrente*) courses at

basic or secondary level; after-work training courses; programmes to help young people with basic and regular or vocational secondary school leaving certificates to enter the labour market; other vocational training activities which adapt the curricula of the vocational courses to the features and needs of the evolving socio-economic fabric.

Vocational Schools can also organise vocational courses for students aged 15 and over, who have completed the second cycle of education and have dropped out or are in danger of dropping out of education.

4B.1 Organisation of the school

Under the new regime set up in 1998, the Vocational Schools (EP) are private educational establishments. At the same time the State can also set up public schools in order to secure access to this alternative path in those parts of the country that are not covered by the existing EP network. These schools fall under the scientific, pedagogic and operation supervision of the Ministry of Education (ME), and carry out their cultural, scientific, technological and pedagogical activities in an autonomous fashion.

Private Vocational Schools can be set up either by private individuals and bodies, or by collective bodies, either on their own or in partnership. However, such schools must first be authorised by the ME and must observe the following requirements: the education offered must meet the training needs of the economic and social fabric; bodies which are representative of the economic and social fabric must be included in the school bodies, in the defining of the courses offered and in the related organisation and recruitment of teaching staff whose academic and training profile is appropriate to the training to be granted by the school.

These private schools (EP) can apply for public participation in the financing of the courses that they organise, and for this purpose can conclude multi-annual programme-contracts with the State, so as to allow pupils to attend them in identical conditions to those in which they would attend secondary education.

The Public Vocational Schools are created by a *portaria conjunta* of the Ministries of Finance and of Education, a legal system which also regulates their organisation and day-to-day operations. In the case of schools which have already been created, or which are to be

created following the new legislation published in 1998, an installation committee (*comissão instaladora*) is appointed. The task of this committee is to ensure that the school operates in a normal fashion and develops its own educational plan.

Vocational courses are open to candidates who have concluded the 3rd cycle of basic education or the equivalent. Specifically in the arts areas, vocational courses are also open to students who have completed the second cycle of basic education.

Specialist technology courses are open to candidates with a level III vocational qualification.

The structuring of the classes depends on students' previous level of education and of vocational qualification for which each course is intended. The number of students per class varies between 20 and 26.

4B.2 Curriculum

Curricula, training components, the different programmes and the curriculum organisation for all the different training courses and activities which can be offered by Vocational Schools, are established by legislation under the new regime which has been in effect since 1998.

Vocational courses last for three academic years, with at least 2900 and no more than 3600 hours of training. Students attend classes for 30 hours a week, and each academic year is 40 weeks long.

The curricula include:

- a) Social and Cultural subjects, making up 25% of the total annual timetable, and common to all courses. The socio-cultural part is made up of: Portuguese, a foreign language and an Integration Area (*Area de Integração*);
- b) Scientific subjects, also representing 25% of the total annual timetable, and common to all courses in the same training area. This part consists of between 2 and 4 basic disciplines which are suited to the common base of the various ultimately differing ends. These disciplines should, on the one hand, correspond to secondary level teaching and, on the other, be relevant to the technological applications of the technical and vocational training specified for each course.

- c) Technical/Technological, Artistic and Practical subjects, which should not exceed 50% of the total timetable. This part of the training programme, which is established in the curriculum, can vary for the same course, depending on the region in which the project is being carried out or in line with more specific project objectives. This part consists of 4 to 6 technical disciplines, with a predominantly theoretical part and a predominantly practical part, the latter in the form of a placement to be undertaken in a work context which is directly linked to practical activity in the respective vocational area, and in contact with the surrounding socio-economic fabric.

The methodological guidelines aim at adjusting strategies to the personalised development the teaching and learning processes, and negotiating new processes suited to the progress of each pupil and class, taking into account the results of the diagnostic activities and the conditions of development of every student, and including all integral evaluation parameters.

4B.3 Assessment and qualifications

Until the implementing regulations for the new 1998 system have been published, the system set up in 1992 is still in effect.

In the vocational courses, assessment takes a predominantly formative and continuous character, and is based on the material learned in each module, group of modules or discipline. The school's pedagogical management is free to establish its own system of annual promotion to the next higher class.

In addition to assessment on each module, students undergo qualitative and quantitative assessment at four distinct points in the academic year. These assessments are carried out by the Class Council, with each school setting the arrangements under which students participate in this process.

Progression through the curriculum takes place as students make adequate learning progress in the modules, groups of modules or disciplines. The curriculum can include a placement. At the end of this placement, the student produces his own assessment report and the accompanying teacher presents a report in which he describes and gives a qualitative assessment of the student's performance in the work context.

The course also includes, as an integral part of the assessment process, a vocational aptitude

examination (*prova de aptidão profissional – PAP*), in the form of inter-disciplinary project. The pass grade in this examination is 10 or above.

The final grade mentioned in the certificate is obtained from the combination of the different training components: final curriculum grade and the final grade in the vocational aptitude examination.

The specialist technology courses are assessed in two ways: formative, continuous and systematic assessment and summative assessment of the training components in the school and work context. This latter also includes a PAP. The summative assessment is expressed on a scale of 0 to 20. The final course grade is obtained from the combination of the following components: the grade for the school training part, equal to the average of the final grades in all disciplines or areas; the grade of the work context part and the final grade in the vocational aptitude examination.

4B.4 Transition/certification/guidance

When students do not obtain grades which allow them to move up a module, or training or subject unit, they can ask the pedagogical administration to provide them with additional teaching support. It may also, in addition to this, opt for one of the following: the student repeats the module intensively during the academic holidays; repetition of the training unit; repetition of specific discipline; repetition of the whole curriculum.

With regard to the transition of vocational course students, the annual promotion system coexists with a system of progression by modules. Students are awarded the certificate of secondary studies (*diploma de estudos secundários*) if they obtain pass grades in all the disciplines which make up the socio-cultural and scientific parts of the course and fail only one subject in the technical part.

On completing the vocational courses, students are awarded a certificate of secondary studies and a level III vocational qualification certificate. The vocational qualification certificate is gained on completing the curriculum and passing the vocational aptitude examination (PAP).

At the start of the teaching activities, and as part of the integral evaluation parameters, the school's technical-pedagogical management defines the educational support activities to be made available, in particular remedial and support classes.

4C Art education courses

Artistic education can be provided in artistic secondary schools, in vocational schools which specialise in art, in which there are several training courses in the artistic field, and in mainstream secondary schools.

Secondary schools which provide normal education offer three art courses:

One of the courses (CG – *Agrupamento 2-Artes*) is intended for young people who wish to continue their studies; the other two are technology courses ('design' and 'arts and crafts') which lead to a level III vocational qualification, in addition to the secondary school leaving certificate. All the courses last for three years.

These schools offer training in various fields of art, in particular graphic arts, textiles, pottery, jewellery, fashion, cinema, audiovisual, dance, drama and music.

They last for three years and lead to the same certificate as the other vocational courses.

Secondary art schools

These art courses have their own curricula and are intended for young people who wish to continue their studies or enter employment.

In the fields of dance and music, specialist training is provided for pupils with recognised aptitudes and talents in these areas. They can continue studies of this kind after finishing basic education if they have previous experience. These training courses are held in conservatories, music schools and academies, and dance schools, which offer an education incorporating or connected with that in normal secondary schools.

In the field of visual arts, specialist courses are run in schools only in Lisbon and Porto.

Teachers of Post-Compulsory Secondary Education

All teachers in secondary education are subject specialists.

Today prospective non-higher education teachers study for a specific vocational qualification, covering both academic discipline(s) and pedagogics.

The 1986 Comprehensive Law on the Education System determined that initial training of the 3rd cycle basic education and secondary school

teachers would take place exclusively at the universities. With the amendment to the Comprehensive Law which was legally established in 1997, teachers of the 1st, 2nd and 3rd cycles of basic education now train in non-university institutions of higher education (*escolas superiores de educação*) or in university institutions of higher education. Secondary school teachers continue to train in university institutions.

Following the above-mentioned amendment, a legal act published in 1998 defines the conditions under which secondary teachers can obtain the degree of *licenciado*, when they already have a *bacharelato* degree, or the equivalent for the purpose of continuing their studies.

Secondary school teachers may also obtain their vocational qualification by taking *licenciatura* courses providing academic training in the respective area of teaching, supplemented by suitable pedagogical training.

Secondary school teachers of vocational or artistic disciplines may qualify by taking *licenciatura* courses in the respective discipline, plus appropriate pedagogical training.

Secondary school teachers with practical experience of regular or special teaching can qualify to teach in special education by successfully completing courses specially intended for this purpose, given in higher education institutions. These same institutions may also provide other specialist courses: school administration and inspection, managing socio-cultural activities and basic adult education.

State teachers are civil servants. Teachers have access to the profession on the basis of their qualifications and experience. The number of in-service training units considered as a minimum requirement for career progress is equal to the number of years the teacher is required to remain at each salary scale.

Teaching staff in non-higher education are required to work 35 hours a week. Teachers' weekly timetables include a teaching part and a non-teaching part, spread over a five-day week.

Secondary education teachers teach 20 hours a week, where all teaching is done at this teaching level. Teachers are not permitted to teach more than five consecutive lessons. This mandatory teaching portion for secondary teachers is reduced by two hours every five years up to a maximum reduction of eight hours, once teachers reach 40 years of age and 10 years of teaching, 45 years of age and 15 of teaching, 50 years of age and 20 of teaching, and 55 years of age and 21 of teaching. Teachers with

27 years' service receive the maximum reduction, independently of their age.

Statistics

Secondary education 2002/2003

	No of schools (a)	No of teachers	No of pupils
General Courses	584	39551	197574
Technology courses	417		53118
Level 3 courses in Vocational Schools	218	b)6623	30652

- (a) Institutions providing more than one type of course are counted separately each time
- (b) Teaching staff teach both 3rd cycle secondary pupils and 'second chance' education pupils
- (c) Mainland Portugal only

5. INITIAL/VOCATIONAL TRAINING

In order to guarantee that the working population completes basic schooling and obtains qualifying training, leading to the possibility of more highly qualified jobs and opening up more and better prospects of lifelong education and training, the policy measures which have been adopted for the development of the education and training of young people and adults are based on a series of instruments which should be mentioned: the PNE (the National Employment Plan), the PNDES (the National Medium-Term Economic and Social Development Plan) and the commitments of the Strategic Consultation Agreement and of the Agreement on Employment Policy, the Labour Market and Education and Training.

The Agreement on Employment Policy, the Labour Market, Education and Training, which was signed in 2001 by the Government and the Social Partners, identifies as one of its priorities the need to combat the deficiencies in schooling and in vocational qualification.

In order to improve the levels of school qualification and vocational qualification of young people, the commitment states that it will:

- provide a range of education and training that makes it possible to adopt measures to create simultaneously a level 1 and 2 vocational qualification and the certification of the 1st, 2nd or 3rd cycles of basic education, to help improve the student's chances of obtaining qualifications to join the labour market and to increase levels of basic schooling;
- reorganise the education and vocational training policy, in particular within the framework of qualifying initial training courses, based on the real needs of undertakings, and thereby create better links between schools and training centres to ensure a greater degree of adaptation to scientific and technological developments and to the trends of the labour market;
- create conditions that make it easier for young people to access training courses in fields where it is found that there is a particular lack of manpower in the labour market;

- promote the creation of measures that provide a means of bridging the gap that can be seen at the present time between the age at which compulsory schooling ends and the minimum age for entry to the labour market by providing simultaneous and gradual support to help pupils attain progressively higher levels of education and training.
- ensure that all young people up to 18 years of age, whether in employment or otherwise, can attend training or education courses that enable them to attain higher levels of duly certified academic or vocational qualifications;
- include in employment contracts for those under 18 years of age who do not have vocational qualifications a training clause that guarantees access to training and vocational qualifications.

In view of the foregoing and taking into account the high number of young people who are in a transitional situation and seeking to enter working life, in particular those who enter the job market relatively early with inadequate levels of school training and/or with no vocational qualifications, it is important to guarantee the creation of educational and training provisions that make it possible to construct vocational projects which are more in line with their interests and expectations.

Within this framework, the Ministries of Social Security and Labour and of Education have joined forces to launch initiatives in the different areas of academic and vocational guidance and in the field of vocational integration, and have extended their joint and concerted actions in different education and training measures. The aim of these measures is to help with the transition to working life, particularly for those who dropped out of mainstream education at an early age.

5A Apprenticeship system

The apprenticeship system includes a number of apprenticeship and guidance courses.

Legislation passed in 1980 opened the way for young people to receive work-linked vocational training on an experimental basis. This experiment was undertaken jointly by the Ministry of Education and the Ministry of Social Security and Labour, through the Institute of Employment and Vocational Training (*Instituto de Emprego e Formação Profissional* – IEFP). The Apprenticeship Law of 1984 institutionalised the legal regime of this system, aimed at enabling young people to move from the education system to the world of work.

At the end of 1996, new legislation was introduced to reform the apprenticeship system (Decree-Law 205/96 of 25 October), in which apprenticeship is no longer regarded as an emergency measure for young people without alternative forms of education and training. Rather, it is an alternative form of training with its own identity, that is, a system of initial work-linked vocational training, within the framework of vocational training required in the employment market, which gives young people who have left the regular education system at an early age the means to acquire the qualifications they need in order to enter to labour market, and at the same time to further their education and obtain certification.

5A.1 Organisation

The apprenticeship system is intended for young people and adults between 15 and 25 years of age who have not completed compulsory schooling and are looking for their first job. There are guidance courses for those who have not completed compulsory education.

Depending on the candidate's academic level, the apprenticeship courses are divided into: guidance courses level 1, apprenticeship courses level 2, apprenticeship courses level 3 and technological specialisation courses. The duration of the courses depends on the level of academic and vocational qualifications conferred by these courses, on the candidate's academic qualifications and on the specificities of the field of training in which they are seeking integration.

Certification (level)	Minimum schooling required	Schooling equivalent	Duration
I (Guidance)	1st cycle of basic education (4th year of schooling)	Entry into level II apprenticeship courses	800 hours
II	2nd cycle of basic education (6th year of schooling) 3rd cycle of basic education (9th year of schooling)	3rd cycle of basic education (9th year of schooling) Capitalisation of credits for continuing in level III	1800/ 3000 hours 1500 hours (minimum)
III	3rd cycle of basic education (9th year of schooling)	Secondary education (12th year of schooling)	4000 hours

5A.2 Education/training establishments

The local training structures of the Institute of Employment and Vocational Training (IEFP), the jointly-managed vocational training centres, the directly-managed vocational training centres and individual persons and groups of persons accredited by the IEFP are considered as training coordinating units. Apprenticeship systems can also be run by State education establishments, when an analysis of the training provision at the local/regional level supports this solution.

According to its statutes, the public training system in Portugal is based on two main groups of bodies:

- a) public institutions with attributions in the field of vocational training, i.e.:
 - the network of directly-managed centres of the Institute for Employment and Vocational Training (*Instituto de Emprego e Formação Profissional*) (30 centres), which organise vocational training actions within the framework of active unemployment policies aimed at providing vocational qualifications for unemployed young people and adults, the reskilling and/or updating of the skills of persons of working age and specific training for underprivileged social groups.
 - a series of other institutions that provide (initial or continuing) vocational training courses which are managed directly or supervised by the Public Administration within the framework of the various sectors of activity, such as agriculture, tourism and health.
- b) the jointly-managed centres (*Centros de Gestão Participada*), which are institutions

supported by public funds through protocols concluded between the IEFP and other public bodies, normally on a sectoral basis and which result from protocols concluded with employers' federations and/or trade union organisations. There are 26 centres covering a variety of sectors.

The basic elements of the training system in Portugal are the companies (for the continuing training of its workers) and a series of training bodies who can access public funding when they develop their activities in accordance with national training needs and policies.

In 2000, 61,288 trainees received training through the Directly-Managed Centres (*Centros de Gestão Directa* – CGD) and 57,354 by the Jointly-Managed Centres (*Centros de Gestão Participada* – CGP). In 2001, there was a slight reduction in the number of trainees: 57,726 in the CGD and 48,257 in the CGP.

Source: IEFP

5A.3 Financing

The Ministry of Social Security and Labour finances the apprenticeship system through the IEFP and the training bodies. Training bodies accredited by the INOFOR can also apply for grants from the European Social Fund.

Trainees in the apprenticeship system are eligible for various forms of assistance enshrined in the apprenticeship contract concluded with the training bodies, regular assistance from public funds, including: grants for food, transport and housing; social welfare that can cover expenses relating to the care of dependent children and family members; unemployed trainees whose family income per capita is equal to or less than the minimum monthly wage can receive training grants. Exceptional forms of support are also provided for trainees in special situations or cases, who fall under special measures, have qualification levels, or come from regions or sectors that are considered as having priority.

5A.4 Curriculum

The apprenticeship courses are organised according to the following areas of training: agrifood; fisheries; the automobile industry;

footwear; ceramics and glass; civil construction; electricity; energy; cold and air-conditioning; extractive industries; graphic and paper industries; metallurgy and metal mechanics; goldsmithery; chemistry; textiles and clothing; banking and insurance; hotels, restaurant catering and tourism; IT; personal and community services; transport, quality, cork processing, electronics, casting, wood and furniture.

Apprenticeship lasts from one to four years, and includes three components:

- socio-cultural training, provided in vocational training centres, including Portuguese, the contemporary world, a foreign language and personal and social development is aimed at the acquisition of skills, attitudes and knowledge for personal, professional and social development of individuals and their integration in the labour market (25% of the training time);
- scientific-technological training, also provided in vocational training centres. This varies according to the vocational sector and includes basic science subjects (mathematics, information technology, basic science and specific technologies). These subjects provide support for technological fields and for work simulation activities (45% of the training time);
- practical training, given in a work-based context, designed to consolidate the skills acquired during training. This training time is distributed as follows over the training period: 10% in the 1st year, 25% in the 2nd year and 45 % in the 3rd and 4th years;

The regulations for each occupation or group of occupations are defined in proposals issued by the National Apprenticeship Committee (*Comissão Nacional de Aprendizagem* – CNA) and adopted by joint decrees of the Ministries of Education and of Social Security and Labour.

5A.5 Assessment/qualifications/guidance

Throughout the course there should be a formative and continuous assessment of trainees in all aspects of the curriculum by means of tests and examinations in the three parts: general, technological and practical training.

Marks ranging from 0 to 20 are awarded for each aspect or part of the course. Ten points are considered the average minimum mark necessary to pass in each of the parts.

At the end of the year, an assessment is carried out based on the arithmetic mean of the marks obtained in the three components. To move up to the next year, the trainees must obtain no less than 10 in the three parts. However, in a general or technology subject marks less than eight are not accepted.

Trainees who pass the final year of their course can be admitted to an examination of vocational aptitude.

All the elements of assessment must be included in the trainee's report card, which is presented to the examining board to be taken into account when they make the final assessment for the course.

The examining boards for the tests include at least three representatives from the respective technological area: one representative of the IEFP, who will chair the board; a trainer in technological training and simulation; and a monitor for practical training.

The examining board for the vocational aptitude examination includes at least one representative from the Ministry of Education, the IEFP who will chair the board, and the social partners.

Trainees who successfully complete their apprenticeship are awarded a *Certificado de Aptidão Profissional* (certificate of vocational aptitude), which is important for the purposes of issuing professional documents and can be recognised as a certificate of academic equivalency to the 2nd or 3rd cycle of basic education or secondary education.

5A.6 Statistics

24,765 trainees entered the apprenticeship system in 1999, 26,028 in 2000 and 25,219 in 2001.

In 1999, the number of trainees rose by around 67%. The majority continued their studies to level II. However, compared with 1998 the percentage of trainees fell from 36% to 32%. The level III courses launched in 1999 had an increase in 2000 of 6% compared with 61% of trainees in 1999. The percentage of trainees in the guidance courses (level I) in 2000 showed an increase of 1% compared with the previous year, with a success rate (overall) of 71%.

Source: IEFP

5A.7 Guidance

The objective of guidance is to help pupils continue their studies (at the end of compulsory schooling) and, at the same time, to set conditions for access to courses leading to a qualified trade.

Guidance is intended for young persons between 15 and 25 years of age who as of the date of enrolment have not completed compulsory schooling, have not attended a school or course within the education system and entered the system before 1987 (start of the 9-year compulsory schooling system).

Guidance includes: general training (16 hours/week) and vocational training (19 hours/week) in a specific subject area, incorporating a practical component in which the young person gains experience in the workplace (20% of the total training time).

The assessment of trainees is continuous, but it is described in general terms – “suitable” and “unsuitable”. Those who are considered “suitable” are those who pass the guidance course. Those who are “unsuitable” can repeat the year.

Furthermore, in accordance with the levels of qualification set by the European Union, the apprenticeship system is as follows:

Certification (level)	Minimum schooling required	Schooling equivalent	Duration
I (Guidance)	1st cycle of basic education (4th year of schooling)	Entry into level II apprentice-ship courses	1-2 years
II	2nd cycle of basic education (6th year of schooling) 3rd cycle of basic education (9th year of schooling)	3rd cycle of basic education (9th year of schooling) Capitalisation of credits for continuing in level III	3-4 years 1-3 years
III	3rd cycle of basic education (9th year of schooling)	Secondary education (12th year of schooling)	3-4 years

5A.8 Training of trainers

This type of training is governed by Regulatory Decree no. 66/94 of 18 November, which defines the concept of ‘trainer’, the types of trainers and the requirements for training staff. The pedagogical training can be given either by

the National Centre for the Training of Trainers (*Centro Nacional de Formação de Formadores*) or by other public or private bodies which are accredited for this purpose.

The trainers for apprenticeship courses at the IEFP and for technical-vocational courses are trainers recognised by the latter institution and the Ministry of Education.

The IEFP is the body responsible for the certification of the aptitude of trainers. Only actions provided by certified trainers will be co-financed by the public bodies.

A total of 2,301 trainees were catered for in 2001.

Source: IEFP

5B Initial Qualification Courses

In order to integrate young persons in the world of work, a number of other training programmes have been developed (in addition to the apprenticeship courses). These programmes are part of the Operational Programme for Employment, Training and Social Development, within the framework of Community Support Framework III.

The National Employment Programme (1998-2002), through the network of IEFP centres, has sought to respond effectively to the training needs of young people and unemployed adults. The link between education, training and employment which is the focus of the PNE highlights the need to create flexible training courses that meet the individual training needs of the parties concerned.

Thus, within the context of the qualification itineraries, reference frameworks have been created that can lend structure to training courses based on credit units.

The initial qualification courses are part of the system of qualification itineraries, which, through a structure based on credit units, is designed to enable students to acquire the skills needed to make them more employable. This system can be applied for the purpose of obtaining an initial qualification, within initial training for young persons and adults who are looking for their first job or for the purpose of obtaining a vocational qualification, vocational reskilling, advanced training or specialisation within the system of continuing training for persons in employment or the unemployed.

The objective of the credit-based training itineraries is:

- to promote the development of trainees through an analysis of their needs, motivations and experience as workers within society and in the world;
- to stimulate the development of the creativity of trainees in the construction of their own career;
- to foster understanding and knowledge of the new technologies.

The qualification itineraries – based on credit units – can be promoted by public or private bodies. These are implemented at the initiative of the Institute of Employment and Vocational Training (*Instituto do Emprego e Formação Profissional* – IEFP) through Directly-Managed Vocational Training Centres (*Centros de Formação Profissional de Gestão Directa*).

These are flexible training modules, and their duration depends on the level of vocational qualifications conferred by these courses, on the level of academic qualifications of the candidates and on the specificities of the field of training in which they are seeking integration. This system is designed to foster the personal, vocational and social development of the trainees. It enables them to enter and leave the training paths at intermediate points and adapts to the needs of the users.

These courses are directed at young people and adults who have at least completed the 6th year of schooling.

Young persons with no qualifications follow complete qualification itineraries, through initial qualification courses (levels 2 and 3). Persons of working age (employed or otherwise) can follow training courses according to their interests and needs or can upgrade or identify the skills they have already acquired, thus overcoming certain qualification deficits. Qualified adults can also follow tailored training courses (with credit units) to update and improve their knowledge and skills. For those who are unemployed, the aim is to achieve vocational education.

The implementation of this flexible model, with all the potential it holds, requires an effective introduction to modern education practices to enable individuals to improve their performance in their work and to develop employability, such as problem-solving, independence, initiative, teamwork and the collection and dissemination of information.

Depending on the student's academic qualifications, the qualification itineraries are based on credit units and are subdivided into: initiation courses level I (corresponding to a pre-

qualification for a given activity), qualification courses level II and qualification courses level III.

The training paths embrace the following areas: administration/management; agriculture and fishing; commerce; civil engineering and public works; electricity, electronics and telecommunications; energy, refrigeration and air conditioning; hotel/catering and tourism; graphic and paper industries; data processing; wood, cork and furniture; mechanics and materials handling; personal and community services; textiles and garments.

All the initial qualification courses include training components: socio-cultural, scientific-technological and practical.

The training actions – based on qualification itineraries levels 2 (1,200 hours) and 3 (1,500 hours) – have the following curricular structure and duration respectively:

- socio-cultural (120h/140h): development of personal and social skills, promotion of self-esteem, oral and written communication, foreign language, information technologies, citizenship for the future, health, environment and safety, and job-finding skills;
- scientific-technological (840h/1000h): mathematics and specific technologies;
- practical (240h/360h): work context.

The assessment of the trainees is continuous and formative. Trainees completing the qualification itinerary are entitled to a level II Vocational Qualification Certificate (*Certificado de Qualificação Profissional*) depending on the type of course. Trainees successfully completing a training course consisting of one credit unit receive a non-qualifying Vocational Training Certificate (*Certificado de Formação Profissional*).

The (short) qualification courses also follow the same curricular structure, combining socio-cultural and practical training with on-the-job scientific-technological components.

This training module was followed in 2000 by 8,232 trainees and in 2001 by 6,695 trainees.

Source: IEFP

5C Education and training courses

As part of the commitments undertaken in the Strategic Consultation Agreement and in the Programme for Integrating Young People into Working Life (*Programa para a Integração dos Jovens na Vida Activa – PIJVA*), the Ministries of Education and of Social Security and Labour, through joint Official Communications (*Despachos conjuntos*) no. 123/97 of 16 June (D.R., 2nd series, 7 July 1997) and no. 897/98 of 6 November (D.R., 2nd series, 22 December 1998) created the education and initial vocational training courses – Programme of Education and Training.

The objective of these education and training courses is to increase the employability and to improve the conditions of socio-vocational integration of all those who have dropped out of the education system.

This programme aims to enable students to complete basic schooling (3rd cycle of basic education), guaranteeing academic equivalency and the attainment of a vocational qualification (level II).

These courses are intended as an integrated provision for young people who are not covered by the compulsory schooling system and for employed and unemployed adults who do not have the diploma for the 3rd cycle of basic schooling, as well as for those who have completed the 9th year of schooling or who do not have the diploma for the 3rd cycle of basic schooling but who have completed the 2nd cycle (6th year of schooling).

These training itineraries, which consist of a range of training courses within the Education and Training Programme, provide flexible training projects (complete or incomplete) throughout working life. They therefore allow students to obtain credits connected with the qualifications they have acquired in the different units and enable trainees to alternate between periods of training and periods of work.

The training itineraries are defined taking into account the courses desired, technical capacity (in human and material terms) and the training interests and needs identified, for a given region, in cooperation with the Job Centres, the schools, the social partners and the local authorities and undertakings.

The structure of the training and education itineraries is based on constant interaction between the process of acquisition of technical

skills and the development of transversal skills to guarantee comprehensive training for each trainee.

They are based on a structure that favours interaction between general, socio-cultural and technical training components and, for young persons and unemployed adults, a period of practical on-the-job training.

Each stage is preceded by an analysis of the trainee's training path to date.

The organisation and provision of education and training courses is the task of the Ministry of Education and of the Institute of Employment and Vocational Training. The courses take place in schools, jointly-managed vocational training centres and other accredited training bodies, whenever possible linked in with the local social environment.

The duration of the training itineraries varies according to the participants/target population. However, the minimum duration for the attainment of qualification level 2 is as follows:

- A general training part consisting of Portuguese, a foreign language and mathematics. The minimum duration is 100 or 400 hours, depending on whether or not trainees have completed their 9th year of schooling.
- A socio-cultural training part, including personal and social development; health, hygiene and work safety. The minimum duration is 100 or 280 hours, depending on whether or not trainees have completed their 9th year of schooling.
- A technical training part in the areas of information technology and technologies specific to the selected vocational area. Minimum duration of 820 hours.
- practical on-the-job training lasts 2 to 4 months.

The total hours (max. 2,200 hours – not including practical training) depends on the individual training profiles, the initial assessment and the progress of the group during apprenticeship.

The final mark of the general training part and the socio-cultural training is obtained by taking the simple arithmetic average of the marks obtained in each of the areas, on a scale of 0 to 20. The final mark for the technical training part is the result of the assessment of the technical skills acquired, expressed on the same scale. The final end-of-course mark is the weighted average of the marks obtained in each training part.

A trainee is considered to have completed the course successfully when the final mark is 10 or more. To obtain a certificate for the completion of the 3rd cycle of basic education, the trainee has to complete the course successfully and obtain, in the general training part, a final mark of 10 or above. In order to obtain a level II vocational qualification certificate, the trainee has to complete the course successfully and obtain a final mark of 10 or above in both the socio-cultural training and the technical parts.

Certificates are awarded by the training centre or by the training body which is responsible for the course. Certificates have to be validated by the respective regional education directorates and regional delegations of the IEFP.

Access to training activities follows a process of vocational guidance undertaken by the employment centres, working together with the vocational training centres and other training bodies. The training team from the training centre or the training body includes, apart from the trainers, vocational guidance counsellors, social service as well as employment officers.

During the launch year, the education-training actions developed in the IEFP centres in the different regions catered for 1,963 trainees.

During the launch year, the education-training actions developed in the IEFP centres in the different regions catered for 495 trainees, and in 2001 1,357 trainees were trained.

Source: IEFP

5D SUB 21 programme

Workshop schools

Sectoral training

The SUB 21 programme was designed for young unemployed persons who have signed up with the Job Centres and are looking for a new or a first job. They must be at least 15 years old and must not be over 20. Applicants must not attend any other education/training course, and they must be in one of the following categories: persons who have not completed the 3rd cycle of basic education or who have not completed secondary education but have completed the 3rd cycle of basic education.

This programme, which was launched by the Government within the framework of the National Employment Plan of the Ministry of Social Security and Labour, aims to guarantee

all young persons under 20 years of age an opportunity to follow a course of training enabling them to obtain a qualification that will, on the one hand, increase their chances of vocational integration and, on the other hand, enhance their personal and social skills to help them obtain academic equivalency.

The network of IEFP centres analyses the applicant's personal preferences, taking into account their Personal Employment Plans, the aim being to seek the most suitable training solution that is consistent with the career plans of each young person within the dynamics of vocational guidance.

Within the framework of the Employment Social Market (*Mercado Social de Emprego*), a programme that involves a series of actions aimed at ensuring the integration of the unemployed in activities geared towards social needs, a programme was set up in 1996, the school/workshop programme (*portaria* no. 414/96 of 24 August), with the aim of providing initial vocational training for young persons and unemployed adults in the traditional crafts and promoting the natural and urban heritage. This is a dual education/training programme. It lasts 12 months and includes practical and theoretical training components.

In 2000 a total of 5,288 trainees took part in this programme, while the figure for 2001 was 4,887 trainees.

Source: IEFP

The initial training developed under the responsibility of sectoral ministries and other public bodies with different forms of organisation and formalisation is designed to fill certain gaps in traditional training systems or to cater for specific target populations. This type of training seeks to ensure the curricular development of its staff or others, normally using public funds.

The training given within the framework of the **Ministry of Agriculture, Rural Development and Fisheries** is geared towards providing initial training for young persons and helping them set up in business as agricultural entrepreneurs. Also, it provides support for the initial and continuing training of workers and farmers and the continuing training of trainers and technical experts to meet the need for educational and technical-scientific training perceived within the sector.

At the present time, in addition to this training initiative which is directly under the supervision of the Ministry, there are initial training courses within the framework of farmers' associations, such as the *Confederação dos Agricultores de Portugal* (CAP), in addition to the training

actions implemented within the framework of agricultural colleges (ME), the apprenticeship system and other measures managed by the IEFP.

The sector also benefits from the apprenticeship actions implemented within the framework of its particular training system and under the supervision of the IEFP. However, these actions are very thin on the ground, as the sector has few undertakings which can take on apprentices for work-linked training. Within the framework of the initial qualification system promoted by the IEFP, initial training actions have been implemented in the agrifood sector for young persons looking for their first job or for the unemployed.

The *Escolas Tecnológicas* (Technological Schools or ETs), which were set up within the framework of the **Ministry of the Economy**, provide initial training and development for middle-management staff through technological specialisation actions.

In addition to providing initial training for young persons in technical and technological fields, the objectives of these actions is to reskill technicians who are already of working age, the aim being to encourage technological innovation. This model provides highly qualified professionals with considerable scientific and technological training and creates a strong link between school and industry. The purpose of the *Escolas Tecnológicas* is to create a post-secondary system of initial training and specialisation that is flexible and geared towards the labour market.

Following the creation of the *Cursos de Especialização Tecnológica* (Technological Specialisation Courses – CET) under *portaria* no. 989/99 of 3 November, training courses were set up for middle managers in January 2002 under a *Despacho Conjunto* (joint order) of the Ministries of the Economy, of Education and of Social Security and Labour. These courses were created with the aim of meeting the needs of the labour market in connection with this category of executives.

The CET courses, whose principles are enshrined in the guidelines set out in the National Employment Plan, are designed to enhance the level of scientific and technological knowledge in the fields which are part of basic training and to foster the development of adequate personal and professional skills for highly qualified jobs through courses that meet the objectives of vocational qualification and integration and enable students to pursue their studies. The CETs are non-higher post-secondary training courses in the same area or in a similar area of training in which the

candidate has obtained a level III vocational qualification and are divided into various components: socio-cultural training, scientific-technological training and on-the-job training.

The legal framework defined by the National System of Certification (SNC) regulated by Decree-Law no. 95/92 of 23 May is intended to guarantee a coherent framework for the training courses and, for those who successfully complete the CETs, the awarding of a technological specialisation diploma (DET) and a level IV vocational qualification. In addition, without neglecting the importance of the objective of vocational integration, students are given the possibility of special access to higher education, as to this end the promoting bodies conclude protocols with the higher education institutions.

Finally, the *Instituto de Formação Turística* (INFTUR) develops various course modules and training actions geared towards young persons and persons of working age:

- Initial higher-level training courses (level V), lasting 3 to 5 years, after the 12th year of schooling; these courses lead to higher-level academic certification (*bacharelato* or *licenciatura*) and vocational certification;
- Initial training and technological specialisation courses (levels III and IV), lasting 2 years after the 12th year; these courses lead in the 1st year to a training certificate (level 3) and in the 2nd year to a technological specialisation diploma (level IV) and vocational certification;
- Vocational training courses with academic certification, lasting 3 years, for young persons who have completed the 9th year of schooling; these courses lead to academic certification at the level of the 12th year of schooling and vocational certification;
- Vocational training courses, lasting 1 year, for students who have completed the 12th year of schooling; these courses lead exclusively to vocational certification;
- Vocational training courses, lasting 1 year, for students who have completed the 9th year of schooling; these courses lead exclusively to vocational certification.

6. HIGHER EDUCATION

State higher education

The Ministry of Science and Higher Education was created within the framework of Decree-Law no. 120/2002 of 3 May, approving the Organic Law of the XV Constitutional Government. It is to this Ministry that the appropriate powers were transferred to administer higher education, which up until then had been under the Ministry of Education.

State higher education consists of both university higher education and polytechnic higher education. The creation of polytechnic institutes began in 1979, although most of the schools set up only came into operation in 1985/86. This specifically vocational education is provided in strategic areas for the economic and social development of the country at basically regional education establishments.

University education aims to ensure a sound academic and cultural preparation, to provide technical training in vocational and cultural activities, and to foster thinking skills, innovation and critical analysis.

Polytechnic education aims to provide sound cultural and technical training at a higher level, to develop ability for innovation and critical analysis and to provide theoretical and practical education in the sciences and their application to professional activities.

Legislation introduced in 1998 created and provided the regulatory framework for two-stage *licenciatura* courses in public, private and cooperative polytechnic institutes. At the same time it made the *licenciado* grade mandatory for all basic education teachers. This means an end, in the short term, to specialist non-university higher educational courses.

Private and cooperative higher education

Private and cooperative higher education is governed by legal instruments which define the conditions for setting up institutions and courses, for the recognition of the respective academic degrees, for the assessment of teaching quality in accordance with the general system applied by the Ministry of Science and Higher Education to the entire spectrum of education and for financial support.

Private and cooperative higher education has increased since 1986, when the establishment of several universities and a large number of private higher education institutions was authorised.

Higher education dependent on other Ministries

Some higher education is dependent on the Armed and Police Forces, provided by the Military Academy, the Air Force Academy, the Naval School and the Higher Police School. These State higher education institutions are all under the responsibility of various Ministries and are normally the subject of dual supervision: general supervision by the Ministry on which they are administratively dependent, and scientific supervision by this Ministry and by the Ministry of Science and Higher Education.

The Naval Academy, the Air Force Academy and the Naval School award *licenciado* degrees (higher education qualifications) in their respective areas of specialisation.

6.1 Admission requirements

State, private and cooperative higher education

In 1992/93 a new system for admission to State, private and cooperative higher education (universities and polytechnic institutes) came into force. This system was revised in 1996 and 1997. The autonomy of higher education was increased in 1997 with the definition of financing bases for higher education, for which legislation was also passed in 1997.

Access to courses in higher education establishments is subject to *numerus clausus* and the definition of areas of influence. The number of places in State higher education under the aegis of the Ministry of Science and Higher Education is set every year by the respective management bodies of the institutions and communicated to the Directorate-General of Higher Education. In private and cooperative higher education, the number of places is set by the Ministry of Science and Higher Education, taking into account the proposals of the institutions.

Applicants must have successfully completed the 12th year of secondary education or hold legally equivalent qualifications. Access is based solely on their secondary schooling results and their results in the national secondary education examinations in the specific disciplines that are legally established for each type of course in each type of institution.

The legal framework for the new system of access and entry to public, private and cooperative higher education establishments, which comes into effect in 1999/2000, is already defined by a legal act of 1998. Legislation also published in 1998 introduces changes into the regulation of the special systems which have been in effect since 1993, as well as the amendments introduced in 1996. The special entrance examinations for holders of the special skills assessment examination, for persons who have completed medium and higher-level courses, and for students from other education systems will be adjusted with respect to matriculation and enrolment in higher education.

There is a centralised general admission procedure for State higher education. Through the National Commission for Access to Higher Education (*Comissão Nacional de Acesso ao Ensino Superior – CNAES*), applicants must indicate, at national level and in order of preference, six higher education establishments/courses they would like to attend. The selection of applicants for each course is determined for each education establishment by a mark, calculated on the basis of the various tests and secondary education grades.

The national entrance examination to public higher educational establishments and courses, is generally the same for university and polytechnic higher education.

In the case of polytechnic education, preference is given, in respect of up to 50% of places, to candidates from a geographical area of influence selected for each course of each establishment of this sub-system. The percentage of vacancies to be set aside and the areas of influence are set every year.

The rules for access to the *Universidade Católica Portuguesa* (Portuguese Catholic University) do not fall within the legal provisions of the status of private and cooperative higher education. Since 1990, this university has had special regulations and its own body of legislation.

Without prejudice to its institutional specificity, the Catholic University is subject to the arrangements established by Law no. 1/2003 approving the Legal Arrangements for the

Development and Quality of Higher Education.

6.2 Fees/Financial support for students

State higher education

The policy of social support (*acção social*) in higher education, defined in the 1993 legal act, is now part of the framework of educational social support in general. Nonetheless it presents certain specific aspects deriving from the principles of university independence and depending on the individual situation of beneficiary students. Under the provisions concerning financing contained in the 1997, and in particular the relationship between students and the State, social support in education consists of two types of support: direct social support (study grants – covering expenses like entrance fees and at times also books and educational material – and emergency assistance) and indirect social support (health services, canteens, housing and other educational support). Legal developments were introduced in 1998 into the comprehensive law on public higher education in the areas of social support, more specifically with the Student Support Fund.

Under this new financing framework, the fees are paid in return for the benefits which the higher educational institutions provide to the students. The amount of the fees is independent both of the student's socio-economic level and the institution or course attended. This fee is set annually and constitutes the specific income of the higher education institution. The annual fee is equal to the national minimum monthly salary at the start of the academic year, and students applying for study grants pay their fees only after the final decision has been made on their applications.

The objective of the Student Support Fund, the remit of which was first defined in 1998, and which is a structural part of the financial and social support system in the area of higher education, is to promote, coordinate and accompany the system of loans in order to grant financial autonomy to higher education students.

Private and cooperative higher education

The Statute on Private and Cooperative Higher Education (*Estatuto do Ensino Superior Particular e Cooperativo*), which came into effect in 1994, recognises the specificity and importance of the

private sector at this level of education. For this reason, every year standards have been published covering the granting of student fee subsidies to students in this sector. All needy students can ask for a study grant to cover the payment of higher education fees.

6.3 Academic year

State, private and cooperative higher education

There is no fixed date at national level for the beginning of the academic year in higher education institutions, as each School Board is responsible for its calendar. However, the year generally begins on October 15 and ends on July 31. Most institutions divide the academic year into two semesters, although certain subjects may be given throughout the year.

The academic year normally lasts for 15 to 16 weeks per semester, and the students usually have an average of 25/26 to 32 weekly class hours.

The organisation and duration of the academic year is similar for the university and polytechnic education. Only the general regulation governing two-stage *licenciatura* courses, which was approved by a legal act published in 1998, requires the curriculum of each course to be approved, and the respective curriculum units to be divided up into years or semesters, together with the options and branches where these exist.

6.4 Courses

State higher education

Within the scope of State higher education, the universities offer courses in all fields of study (humanities, social and behavioural sciences, business and management training, law, natural and exact sciences, mathematics and computer science, engineering sciences and technology, medical sciences, agriculture, forestry and fisheries, architecture and town planning and physical education). These courses may last for four, five or six years and lead to *licenciado* degrees. Under the system of teaching autonomy which applies in Portuguese universities, the assessment of knowledge and the testing of teaching experience is left up to each university.

The polytechnic institutes cover study areas such as agriculture, education, technology and/or management, accountancy and administration, engineering, art, nursing, sailing, conservation and restoration. Courses last for three or four years and lead to *bacharelato* or *licenciado* degrees respectively.

Under the system of teaching autonomy enjoyed by polytechnic institutes, the plurality of teaching methods is up to each establishment. In the case of two-stage *licenciatura* courses, given their objectives and special features, the following methodologies may be adopted for developing curricular units in the overall curriculum: theoretical; theoretical-practical; practical; seminar and placement.

Private and cooperative higher education

Private and cooperative higher education offers a wide range of courses from law, social sciences, humanities, fine arts, architecture and town planning, mathematics, computer science, business and company administration, engineering sciences and technology to dentistry. These courses last for three or four/five years, depending on whether they lead to *bacharelato* or *licenciado* degrees.

6.5 Assessment/qualifications

State higher education

Students are assessed in each subject in their course. Assessment procedures depend on the institution or faculty concerned, but usually take the form of examinations. Students may retake examinations they have failed.

The following academic diplomas are granted in university higher education: *Bacharel* – a degree normally requiring three years of study, in certain cases one or two semesters less. It recognises that the holder has received an academic, technical and cultural education which allows him or her to exercise certain professional activities; *Licenciado* – a degree normally requiring four years of study, which in special cases may be extended by between one and four semesters. This confirms that the student has received solid academic, technical and cultural training enabling him to deepen his knowledge, with a view to specialising in a particular area of know-how up to professional level. *Mestre* – the *mestre* degree confirms that the student has achieved a high level of knowledge in a scientific area and is capable of undertaking research; *Doutor* (Doctor) – the

doctor's degree certifies a high level of culture and an aptitude for research in a particular area of knowledge.

Higher educational institutions may offer courses which, without conferring an academic degree, lead to the granting of a diploma when successfully completed.

In the polytechnic institutes, the assessment of knowledge falls under the teaching autonomy of each institution. The degrees conferred at this level are those of *bacharel* and *licenciado*.

6.6 Teachers

Teaching at higher educational institutions is open to persons having *doutor* and *mestre* degrees, *licenciados* who have passed tests of their teaching aptitude and scientific/academic capacity, and also individuals who are recognisably qualified. For professors at this level of education there is no formal vocational training, although requirements are established for filling each category. Teaching staff are recruited by competition based on qualifications. The career categories for university teaching are: professor (*professor catedrático*), associate professor (*professor associado*), assistant professor (*professor auxiliar*), assistant (*assistente*) and temporary

assistant (*assistente estagiário*). In addition to the above-mentioned categories, the following can also exercise teaching functions on a contract basis: invited professors, visiting professors, invited assistants, readers (*leitores*) and monitors (*monitores*). The first four titles apply to individuals, both Portuguese and foreign, of recognised pedagogical or professional competence. *Monitores* are qualified professionals who have completed their higher education or students in their last two course years.

Teaching staff in higher education may teach on a full-time or a part-time basis. Full-time teaching staff work for a weekly number of hours equal to that normally set for civil servants as a whole. They are required to lecture for up to 12 hours a week.

Part-time teachers have a timetable which varies between 8 and 22 hours a week.

Career professors in public higher education are civil servants.

Private and cooperative higher education

The recruitment of teaching staff is determined by general criteria applied in State higher education, such that each higher education institution can recruit its own teaching staff on the basis of their "curriculum vitae".

7. ADULT EDUCATION AND VOCATIONAL TRAINING

(See also section 5 on the Initial and vocational training)

7.1 Specific legislative framework

The history of adult education in Portugal is a fairly recent one. It was only at the end of 1975, with the restructuring of what was then known as the Directorate-General of Permanent Education (*Direcção Geral da Educação Permanente*) that work began on defining the national system of adult education, that took the form of the Adult Education Plan (*Plano de Educação de Adultos*).

In 1976 the preamble to *portaria* no. 419/76 defined the new concept of adult education as being "to encourage a process of learning specific to adults, which makes these – individually or in groups – the subjects of their own education and the creators of a genuine national culture".

Following legislation published in 1979, preparatory work began on the National Plan for Adult Literacy and Education (*Plano Nacional de Alfabetização e Educação de Adultos – PNAEBA*), the primary objective being the elimination of illiteracy. This formed the obligatory reference document, in the area of adult education, until the publication of the Comprehensive Law on the Education System in 1986, which defined the organisational principles of the education system, considering what it terms "recurrent adult education" (*ensino recorrente de adultos*) as a special form of school education, providing "second chance" schooling, with specific curricula and study methods, and conferring the same diplomas and certificates as the regular education system. The Comprehensive Law also made provision for continuing vocational training, considering "non-school education" (*educação extra-escolar*) as an integral part of the education system, and defining its objectives and activities in the area of a wide range of both formal and non-formal initiatives. The general framework for the organisation and implementation of adult education in its two main areas of recurrent education and non-school education, is established by a decree of 1991. The curricula of the 1st and 2nd cycles of recurrent

basic education were established at the end of the 1980s, whereas the present curriculum of the 3rd cycle of basic education, organised in a system of credit units, was defined later, in 1993.

In 1998 the Ministry of Education launched an overall external assessment of second-chance education aimed at reorganising this type of education according to social needs.

The legal framework for vocational training is established by two decree-laws of 1991. Decree-law no. 401 of 16 October 1991 regulates vocational training both within the education system and within the labour market. Decree-law no. 405 of 16 October 1991 establishes the specific legal regime of vocational training within the labour market. The target groups are employed and unemployed persons of working age, including people looking for their first job, the objective being to enable people to carry out a skilled professional activity. Vocational training, both initial and continuing, is carried out by companies, training centres and other training or employment bodies. At the end of 1997, a working party was set up by the Ministry of Education and the Ministry of Labour and Solidarity with the task of drawing up a strategy document aimed at revitalising adult education. Once published, this document led to the creation of the Adult Education and Training Development Programme (*Programa para o Desenvolvimento da Educação e Formação de Adultos*) and the setting up of a task force charged with putting it into action. This included strategic and technical structuring activities at every level that are pertinent to the adult education and training; setting up and running a network of local organisers of a wide range of adult education and training; setting up a formal system for the validation and certification of knowledge and skills; launching national competitions for financing and supporting adult education and training initiatives which are innovative and relevant in this context, and also implementing activities and processes aimed at creating a national adult education and training agency (ANEFA).

The ANEFA was subsequently set up in 1999. The creation of this agency, which is under the aegis of both the Ministry of Social Security and Labour and the Ministry of Education, underscores the importance given to the need to set conditions conducive to improving the

qualifications of the adult population by enabling adults to make the most of the skills acquired throughout life in formal and non-formal contexts in order to increase the competitiveness of our businesses in the face of the challenges posed by the process of economic globalisation and by the constantly increasing pace of technological change and innovation.

Decree no. 208/2002 of 17 October, approving the new structure of the Ministry of Education, defines as one of the main objectives the need to integrate the policies and systems of education and the policies and systems of lifelong training. This integration policy is designed to guarantee the initial qualification of young persons who do not intend to pursue their studies, ensuring their proper integration into the world of work, and to develop the acquisition of learning by adults.

The concept of integrated education and training under the responsibility of the Ministry of Education led to the creation of the Directorate-General for Vocational Training (DGFV). The transversal action of this Directorate-General will develop mechanisms to facilitate lifelong qualification for young persons and adults. Under the terms of this legislation, this new body takes over from the ANEFA, which has been wound up, along with the functions and powers that were conferred on it within the framework of adult education and training.

In order to bolster the initiatives already developed in the field of education and training intended for young persons and adults with low academic and vocational qualifications, the organisational model of the EFA itineraries was established and regulated under the terms of Decree-Law no. 387/99 of 28 September, Law no. 46/86 of 14 October, Decree-Law nos. 401/91 and 405/91 of 16 October, *Despachos Conjuntos* nos. 1083/2000 of 20 November and 650/2001 of 20 July of the Ministries of Education and of Social Security and Labour.

Within this framework, the DGFV, in the field of adult education and training, is boosting the range of integrated education and training intended for adults to be developed within the framework of a national network of public and private bodies. This involves combining a public service logic with a programme logic, and within this context the Institute of Employment and Vocational Training (*Instituto do Emprego e Formação Profissional* – IEFP), through the network of training centres (under direct and joint management) will assume responsibility for the implementation of a series of adult education-training actions, in particular in connection with the relevant professionalisation

component.

Adult education and training in Portugal (EFA) enables students to obtain a certificate for the 1st, 2nd or 3rd cycle of basic education, together with a vocational qualification (levels 1 or 2), through a system of dual certification (academic and vocational), thus opening up the possibility of access to more highly qualified jobs and more and better prospects of lifelong training. This training offering is based on flexible courses through:

- a list of key skills for basic training;
- a list of training for vocational training based on qualification itineraries divided into credit units;
- a series of itineraries based on the EFA curricular design (set out in *Despachos Conjuntos* no. 1083/2000 of 20 November and no. 650/2001 of 20 July);
- structured processes for the recognition and validation of skills acquired throughout life, through formal or informal avenues.

Furthermore, adult education and training is based on the following guiding principles: lifelong education and training; flexible training courses; flexible training systems, divided into structured modules or units and training tailored to the individual profiles of the candidates; basic training, structured on the basis of the list of key skills for adult education and training, enabling the student to obtain academic equivalency (1st, 2nd and 3rd cycles of basic education) or vocational aptitude training, organised on the basis of the IEFP training inventory and divided into qualification itineraries based on credit units, incorporating a wide range of fields of training.

The beneficiaries of the EFA courses are adults (18 years or over) who have not completed the 9 years of basic schooling and do not have any vocational qualifications. Priority is given to candidates of working age (in employment or unemployed) who have signed up with the Job Centres of the IEFP, in particular those who have signed up for the *INSERJOVEM* and *REAGE* programmes, as well as beneficiaries of the social income measure for social and professional integration (*Rendimento Social de Inserção* – RSI), those who are in retraining and workers in small and medium-sized enterprises (SMEs).

The EFA courses cover the following professional fields: administration and management; agriculture and fisheries; agricultural industries; arts and artistic technologies; human, exact and life sciences; trade, civil construction and public works;

electricity, electronics and telecommunications; energy, cold and air-conditioning; hotels, restaurant catering and tourism; graphic and paper industries; information, communication and documentation; IT; wood, cork and furniture; mechanics and maintenance; metallurgy and metal mechanics, quality; personal and community services; textiles and clothing.

The Saber+ actions, which are actions of short duration, are intended for adults who would like to develop or perfect skills in specific fields, irrespective of their academic or vocational qualifications.

Adult training has been regulated by sector of activity and has at times been incorporated in Regional Development Programmes. In April 1999, a *portaria* was passed to lay down the specific standards for the awarding of certificates of professional aptitude and the conditions for the homologation of the relevant vocational training courses for operators of machine tools and mechanical fitters.

At the initiative of the Ministry of Labour and Social Solidarity (*portaria* 328/99), a work-training rotation measure was set up in February 1999 with the objective of stimulating access to continuing training for workers in small and medium-sized enterprises. This measure gives enterprises the possibility to offer continuing training to their workers and, at the same time allows unemployed persons registered with job centres to obtain professional experience in the jobs of workers who are on training leave. The training activities should take place during working hours, and last no less than 1 month and no more than 12 months. In 2001 48 trainees were catered for within the framework of this programme.

In the fields of adult education/training and the continuing training of persons of working age, the Government and the Social Partners reached an agreement on the creation of Centres for the Recognition, Validation and Certification of Skills (RVCC Centres). The purpose behind the development of this nationwide network is to enable candidates to obtain certification at a certain level of education based on a list of key skills for adult education and training, which are divided into 4 main fields (language and communication, mathematics for life, information and communication technologies and citizenship and employability).

In view of the fact that the existing framework underpinning qualifications in Portugal still presents shortfalls in terms of academic and vocational qualifications, it is important to recognise all the knowledge and skills acquired

in non-formal or informal settings by workers, irrespective of their situation in the labour market. Within this context, the recognition and validation of skills take on a new dimension through the creation of personalised training itineraries which the education-training systems seek to offer through a flexible curricular structure and arrangements that promote the personal, social and vocational development of citizens.

The target public includes all adults (persons over 18 years of age) who have not completed the 9 years of basic schooling.

Thanks to the process of recognition, validation and certification of skills, adults can obtain certification with academic equivalency to the 1st, 2nd or 3rd cycles of basic education.

By the end of 2000, the first six centres had been set up at national level. The network now has an additional 56 Centres, 8 of which are under the responsibility of the IEFP. On average the Centres cater for 100 trainees a month.

7.2 Administration

Legislative authority in this area lies exclusively with the State, although the social partners are accorded specific capacity to intervene in the development of legislation. In this way the Ministries of Education and of Labour and Solidarity are the bodies responsible for adult education and training.

Within the Ministry of Education, it is the Directorate-General for Innovation and Curricular Development and the Directorate-General for Vocational Training that promote, coordinate and support, in a structured manner, the range of adult education and training (second-chance education, extramural activities, EFA courses, skill recognition, validation and certification processes, *S@ber+* actions). The various adult education activities are carried out on site by the Regional Educational Directorates. At municipal level there is a Coordinator for adult education.

The Ministry of Social Security and Labour, through the Job Centres and the Vocational Training Centres of the Institute for Employment and Vocational Training, organises and promotes the implementation of adult training measures and programmes.

The following bodies should be mentioned within the general framework of adult education: a) the Social and Economic Council (CES), which is responsible for deciding on

major economic and social policy options; b) the Standing Committee for Social Consultation (CPCS), the body that signed the agreement on vocational training policy; c) the National Council for Education (CNE), a body which includes representatives of the social partners and has consultative functions on education matters, including matters relating to vocational training; d) the Directorate-General for Vocational Training (DGFV), which seeks to set conditions conducive to improving the qualifications of the adult population; and e) the Committee for Vocational Certification (CPC), the body that coordinates the national system of vocational certification.

Functions of a consultative nature concerning education and vocational training policy matters are still the responsibility of the Employment and Vocational Training Observatory (*Observatório do Emprego e Formação Profissional – OEFP*) or of the Supervisory Committee for the Strategic Consultation Agreement, which was signed by the Government and by the social partners at the end of 1996. The local authorities, the undertakings and the employers' federations and trade associations, the trade union organisations and professional associations, the private social solidarity institutions and the cultural associations at local and regional level are also social partners.

7.3 Funding

The vast majority of the adult education activities developed within the framework of the Ministry of Education are financed by funds from the general State budget. The initiatives promoted by the Directorate-General for Vocational Training (DGFV) (EFA courses, S@ber+ actions, RVCC) are part-financed by the ESF within the framework of CSF III.

7.4 Organisation

The Ministry of Education promotes the implementation of adult education and training initiatives: (i) second-chance education (ii) extra-curricular education, (iii) recognition, validation and certification of skills, (iv) adult education and training courses (EFA courses) and (v) S@ber+ actions. The actual implementation may be entrusted to public and private bodies of any kind, once their scientific and pedagogical

quality is guaranteed and official recognition has been obtained.

In the area of adult education, the following are considered as training bodies: a) secondary education or higher education institutions, vocational schools and other bodies that provide a teaching and supervisory framework for placement students and grant holders; b) employers', professional and trade union associations; c) non-profit bodies operating in the social economy or which provide assistance to disadvantaged social groups and groups in danger of social exclusion, where the training relates to their specific mission; d) public bodies where the training relates to their particular attributions; e) business undertakings and associations of business undertakings which provide training for the labour market and maintain the related accredited training centres. The main study paths in which adult education is organised are:

A) Recurrent education ("*ensino recorrente*"). This path leads, in an organised form and based on a curriculum, to an academic grade and the granting of a diploma or certificate, equivalent to those conferred by regular teaching. The specific objectives of this type of teaching are: a) to provide second chance schooling to persons who failed to benefit from regular schooling at the normal age, to those who left the education system early and to those who need it in order to advance either culturally or professionally; b) to reduce the imbalances in educational levels that exist between different age groups. Access to this type of teaching at the basic education and secondary education levels is open to individuals from age 15 and 18 onwards. To access either level, prospective students must either: a) present an end-of-studies certificate of the preceding level: b) undergo a diagnostic assessment.

In terms of structure, recurrent education is undertaken at the levels of basic education and secondary education. In the 1st cycle of basic education, recurrent education is aimed in particular at the elimination of illiteracy and, in the 2nd and 3rd cycles, the continuation of studies or the development of certain professional skills. The curriculum structure of the 1st consists of a single area which includes Portuguese, Mathematics and the Contemporary World. The timetable and the duration of the course is agreed between the trainers and the students, having as a reference 150 lecture hours or 60 days. The curriculum structure of the 2nd cycle includes Portuguese, Mathematics and Foreign Language (French or English). "Man and the Environment" and "Complementary Training" are also part of the curriculum of this cycle, the latter involving multi-discipline work. The curriculum lasts for 1

year, with adjustments possible according to pupils' needs.

The curriculum structure of the 3rd cycle, organised in a system of credit units, has two components: general training and an optional area. The general training covers Portuguese, Mathematics, Foreign Language (French or English), Environmental Sciences, Social Sciences and Civics. The optional component permits a choice between Technology, Economic Activities and Visual Arts. The programme of each discipline or study area consists of a sequence of units, each with its own contents, objectives, assessment and certification. The course lasts on average three years, though this also depends on the learning speed of the individual pupil. Alternative curricula can also be organised for the 1st, 2nd and 3rd cycles of recurrent basic education, for specific population groups, containing general training and technical training components.

The methodology adopted in recurrent education is aimed at supporting autonomous learning by the student, with the trainer providing clarification of the doubts arising from the use of the textbooks, negotiating individual learning and assessment strategies and indicating additional or alternative material that the student can consult.

Assessment takes two forms: continuous assessment and final assessment. In the 1st and 2nd cycles, continuous assessment is descriptive and qualitative in nature. In the 1st cycle it is global in nature and in the 2nd takes place per subject area. Students who so wish may have a final assessment. In the 3rd cycle, assessment is in the form of marks, on a scale of 0 to 20. The assessment consists of written tests on the specific subject matter, and, in the case of more practical disciplines, of a practical examination. When it comes to certification, recurrent education grants the same diplomas and certificates as those conferred by regular education. In the 2nd and 3rd cycle courses, certificates may be passed per subject area or subject unit, with a diploma awarded at the end of each entire cycle. A diploma at the end of the 3rd cycle of recurrent education is legally equivalent to that obtained at the end of 9 years of schooling. The successful conclusion of a series of supplementary technical training units also permits the student to obtain a level II vocational qualification certificate.

(ii) Non-school education refers to educational and cultural activities organised outside the school system and carried out in the framework of a multiplicity of public or private initiatives, which can be structured in conjunction with recurrent education and school education.

The specific objectives of non-school education are: a) to promote the development and updating of knowledge and skills in place of or in addition to school education; b) to combat literal and functional illiteracy; c) to promote the creative and formative use of free time. Access to non-school educational activities is open to individuals aged 15 or over at the start of the academic year in which their enrol. Non-school education offers three types of courses: a) courses with no intention of obtaining school equivalences; b) courses with their own programmes, aimed at obtaining equivalence with units, subject areas or levels of recurrent education; c) courses which interlink with recurrent education, allowing students to obtain the certificates awarded by the latter.

Methodology adapted in non-school education is: the structures, organisational forms and teaching processes are flexible in nature and are regulated by the specific principles of adult education.

Assessment is continuous and qualitative, with trainers providing individual reports by subject area, setting out the progress made and the difficulties encountered by each student, as well as, at the end, the success or otherwise in meeting to established objectives. At the end of each course the student is given a pass ("apt") or fail ("not apt") grading. When it comes to the certification of non-school education, this "does not constitute a process directed at obtaining an academic grade". However, the knowledge acquired through non-school education may be recognised and credited as equivalent to units or levels of recurrent education, once the mobility between non-school education and recurrent education is guaranteed through a system of curricular equivalences.

(iii) the process of recognition, validation and certification of skills is intended for all adults over 18 years of age who have not completed the 9 years of basic schooling. It allows people with little academic education and people of working age (employed or otherwise) to obtain recognition, validation and certification for the skills and knowledge which they have acquired in the most widely varying contexts throughout their life. Also, this process promotes and facilitates education and training paths, along with academic and vocational certification.

The RVCC centres organise the process for each adult according to three aspects (recognition, validation and certification), according to the list of key skills for adult education and provide a wide range of services, such as information, advice, additional training courses, and local activities.

1. Recognition of skills: This is a process of personal identification of skills previously acquired in a series of activities based on various methodologies, in particular the skills audit. It is during this phase that the adult constructs his personal dossier, a document that contains all the documentation concerning his skills.
2. Validation of skills: This is the formal process carried out by the Centre which consists of a series of activities aimed at helping the adult through the process of assessment of his skills in connection with the 4 areas of key skills and the levels of academic certification, according to the list of key skills for adult education and training. This process culminates in the intervention of the Validation Jury, when the personal dossier submitted by the adult is analysed and assessed, a process which involves interpreting the correlation between all the documentation presented and the list of key skills. Finally, taking into account the skills validation request submitted by the adult, the Jury classifies the candidate into one of the units which are part of the areas of key skills of each of the levels – B1, B2 and B3.
3. Certification of skills: This is a process that certifies the skills which have been acquired by the candidate within formal, non-formal and informal contexts which have already been validated. This process culminates in the registration of these skills in the Personal portfolio of key skills and the awarding of a certificate that is legally equivalent to the diplomas of the 3rd, 2nd and 1st cycles of basic education.

At the end of the RVCC process, the adult receives the Participant's Dossier (Portfolio), his Personal Portfolio of key skills and a Certificate of Adult Education and Training.

(iv) The adult education and training courses (EFA courses) provide an integrated range of education and training, leading to dual certification (academic and vocational). These courses are intended for adults over 18 years of age who have not completed the 9 years of basic schooling, who have no vocational qualifications (employed or otherwise) and who have signed up with the Job Centres of the Institute of Employment and Vocational Training (*Instituto do Emprego e Formação Profissional – IEFP*) or have been referred by other bodies, such as companies, ministries, unions, etc.

The curriculum of each EFA course is organised around two components: basic training and vocational aptitude training. The training itinerary is put together based on the knowledge

already acquired by the trainees, their personal and professional experience and their different socio-economic and cultural contexts, according to three levels of complexity with regard to the list of key skills (B1, B2, B3).

At the end of the training itinerary the trainees may be awarded a certificate of adult education and training: Basic 1 (B1), which is equivalent to the 1st cycle of basic education and to vocational qualification level 1; Basic 2 (B2), which is equivalent to the 2nd cycle of basic education and vocational qualification level 1; and Basic 3 (B3), which is equivalent to the 3rd cycle of basic education and vocational qualification level 2.

(v) the S@bER+ actions consist of a wide-ranging series of actions of short duration which are intended to encourage adults to acquire, develop or reinforce their personal, vocational or academic skills. They are intended for adults over 18 years of age, irrespective of any academic qualifications or vocational qualifications they may possess. The curriculum is flexible and diversified. It is divided into three modules (each lasting 50 hours), according to the different levels of difficulty: beginners', advanced and consolidation. Those who successfully complete one or more modules receive a training certificate.

7.5 Statistics – Adult training and education

7.5.1 Pupils enrolled in second-chance education and their percentage distribution according to level of education

Mainland Portugal, 2001-2002

Provisional data

Level of schooling	No.
Basic education	29 417
1st cycle	0
2nd cycle	2 331
3rd cycle	27 086
Secondary education	71 590
General course ¹	52 928
Technical and technology courses ²	18 662
Total second-chance education	101 007

Source: Department of Assessment and Current and Future Planning – Ministry of Education: Annual School Survey 2001/2002 – Preliminary Survey

1. course for those wishing to pursue their studies
2. course for those intending to enter the job market

7.5.2. Trend of the number of trainees in the apprenticeship system

1998, 1999, 2000

Year	No. of trainees
1998	16 600
1999	21 669
2000	26 078

Source: Ministry of Education and the IEFP. In National Employment Plan 2001

7.5.3. Number of Centres for the Recognition, Validation and Certification of Skills (RVCC) in operation and number of adults catered for

2001, 2002

2001	2002
28 RVCC centres operating	42 RVCC centres operating
7 092 adults catered for	• 21 052 adults catered for

Source: Directorate-General for Vocational Training/Ministry of Education

7.5.4. Number of Adult Education and Training Courses (EFA courses) given and number of adults catered for/to be catered for

2000-2001, 2001-2002, 2002-2003

Year	No. of courses	Adults catered for
2000-2001	13	181
2001-2002	414	4 140 / 6 210 (10 to 15 trainees/course)
2002-2003	413	4 130 / 6 195 (10 to 15 trainees/course)

Source: Directorate-General for Vocational Training/Ministry of Education

7.5.5. Number of S@bER + actions implemented and number of adults catered for/to be catered for in 2001 and 2002

Year	No. of actions	Adults catered for
2001	642	12 634
2002	1 398	27 960 * (approximate estimate based on 20 trainees/action)

Source: Directorate-General for Vocational Training/Ministry of Education

* To be confirmed by the PRODEP

Teachers are basic education 2nd and 3rd cycle teachers and secondary education teachers, see table 4

The number of institutions is the one indicated in tables 3.1 and 4.1

7.6 Continuing vocational training

Continuing vocational training is training which, throughout a person's life, is obtained following initial training in order to improve one's skills. While initial training is characterised by a high level of sectoral differentiation, continuing training is even more varied.

The agreement on the employment policy, the labour market, education and training stipulates that from the year 2002 every year at least 10% of the workers within each undertaking must participate in continuing vocational training actions. It also requires the development of the system of continuing training to ensure that all workers have a minimum of 20 hours of certified training in 2003 and 35 hours in 2006. Within the framework of CSF III, a number of forms of State support have been set in place for the development of continuing training.

Decree-laws nos. 401/91 and 405/91 of 16 October set the legal framework for continuing vocational training under the responsibility of the Ministry of Social Security and Labour. Furthermore, it is the IEFP that organises a considerable proportion of the continuing training courses. To this end, the IEFP has around 30 directly-managed centres covering most of the Portuguese territory and the training

fields that have been defined. The duration of training varies according to the set objectives and the needs of the group (between 60 and 1,500 hours).

The IEFP also works with trade unions and/or employers' federations in 27 jointly-managed training centres. These centres are organised by economic sector and cover almost the entire range of economic activities.

The objective of the continuing training developed within the framework of the IEFP is, firstly, to enable persons of working age (employed or otherwise) to cope with technological, organisational and other changes and, secondly, to encourage vocational training and to improve the quality of employment.

The beneficiaries of this type of training action undergo a diagnostic assessment that identifies the different skills acquired through training and experience. Within continuing training, the duration of the training components varies according to the type of course: updating, upgrading, retraining, qualification and reskilling, vocational specialisation or adult education and training. The main thrust of the continuing training actions developed by the IEFP are industrial training actions.

In 2000, a total of 43,260 trainees were catered for, and in 2001 the figure was 35,765.

Source: IEFP

The training provided under the aegis of the Ministry of Agriculture, Rural Development and Fisheries (MADRP) is mainly intended for persons of working age who have already been integrated in the labour market. This type of training is essentially geared towards business activities and the manufacture and commercialisation of products. It is the predominant type of training within the training action organised by the Ministry. These training courses, which are of short duration, focus on upgrading/updating and lead only to a training certificate.

The continuing training provided within the framework of the **Ministry of the Economy** ensures that within industry there is always a link between an investment project, the diagnosis of training needs and a training plan. And generally speaking, this type of training is intended for workers within applicant organisations who submit training plans.

Within the framework of CSF III (the Operational Economy Plan – Measure 2.3), vocational training is supported through the measure entitled "Train Human Resources for New Challenges". This is a transversal measure which interfaces with the three avenues of intervention of the Operational Economy Plan.

Therefore, the ESF component (European Social Fund) comes into play when investments in training are planned within the framework of the other measures. Within the Operational Economy Plan, the ESF is used exclusively to finance vocational training. The training support measures are based on an integrated project approach, that is, the ESF component is always linked with other ERDF components. The exceptions to this principle concern the initial training promoted by the technology schools and the projects of which the ERDF component is regionally deconcentrated.

The continuing training provided within the framework of the National Tourist Training Institute (INFTUR – *Instituto Nacional de Formação Turística*) trains qualified professionals for the tourism sector. The INFTUR develops training, reskilling, upgrading, specialisation and retraining courses and tailored training courses in the most badly affected fields of training, based on a diagnosis of needs identified within the undertaking. The fields of training are as follows: food and drink, housing, tourism, information technology, management, quality and insurance, human resources and languages. A national training programme (*MELHORTURISMO*) was launched for this sector in the year 2000.

The continuing training offered within the framework of the **Ministry of Health** is provided by training bodies and beneficiary bodies. The training bodies are those which offer training for specific professional groups, while the beneficiary bodies promote and organise actions for their own staff. Within this measure, colleges of further education which teach nursing and health technologies implement continuing training actions for nurses and diagnostic and therapeutic technicians. Within the context of continuing training, there are other operators who promote actions for their own staff (health centres and hospitals).

Within the context of continuing training, health reflects the importance of ESF support measures for the consolidation of the vocational training system of the sector, in particular in the increasingly important link between the training projects and the national strategy defined for the sector.

The regulations for individual access to training and the acquisition of individual participation in training were approved in March 1998 within the framework of the Health Sub-programme. Access to training (by individual initiative) can be obtained by those who work in the health sector, whether they be self-employed or employees. Beneficiary bodies belonging to the health system can participate in the training. Various types of training (qualifying training,

reskilling, vocational updating, upgrading and specialisation and the training required for career advancement and stability of employment) can also be eligible for ESF financing.

The Operational Health Programme (Health XXI), within the framework of Community Support Framework III, pursues the following priority objectives: to improve access to quality health care through training measures aimed at providing support for health modernisation projects. The aims are as follows:

- to give visibility to the implementation of sectoral modernisation projects financed by the Programme by providing qualifications for health professionals directly involved in their implementation;
- to boost the management skills of the managers within the sector.

The beneficiaries are the managers within the sector, other health professionals and professionals from bodies financed by the other measures under the Operational Health Programme.

The continuing training provided within the framework of the **Public Administration** includes a considerable number of training bodies specifically geared towards the development of their own staff. Traditionally, the *Instituto Nacional de Administração* (INA) and the *Centro de Estudos e Formação Autárquica* (CEFA) develop actions for the managers within the Administration and for the personnel of the local authorities.

In addition to the actions promoted by the State institutions, it should be pointed out that a number of private bodies have been emerging (social partners, associations and others) whose activities are becoming increasingly important, thanks to financial support for training, in the field of initial and continuing training. Most of these bodies operate in fields which are specialised by sector or by target public and use public funds made available through programmes set up for that purpose.

1. Trade union associations and employers' federations: these are associations or bodies which are managed by the social partners, and other associations which promote initial and continuing training activities.
2. Undertakings: companies develop training geared towards their own staff through internal training structures or through external bodies.
3. Private consultants: these bodies, which are mostly private but also include non-profit-

making associations, develop training for external target populations.

4. Social solidarity institutions.
5. Training actions supported by programmes: there are also a number of actions which are supported by funds provided through operational programmes supported by the CSF or within the framework of Community initiative programmes.

7.6.1. Financing

There are 3 types of part-financing by the ESF aimed at promoting continuing vocational training:

- Support given to the social partners for the preparation of integrated training plans. The purpose of this type of support is to promote continuing vocational training in a coherent and coordinated manner with accredited training bodies.
- Support given to providers of continuing vocational training, whether they be companies or job centres. The providers can use the funds to organise training courses for their workers or for those of other organisations after preparing a training plan.
- Support given to workers and small and medium-sized enterprises. The workers receive an individual training grant to participate in training courses which are independent of their employer. SMEs can receive individual training contributions when they send their employees to participate in training programmes provided by accredited training bodies.