

# **WORK PROGRAMME “EDUCATION AND TRAINING 2010”**

## **National Progress Report – 2007**

**June 2007**

## CHAPTER 1: PRESENTATION OF THE NATIONAL LIFELONG LEARNING STRATEGY

The National Lifelong Learning Strategy (ENALV) aims at empowering citizens to face economic and social challenges. The concretisation of this strategy will allow citizens to freely move from learning to an employment environment and vice-versa, from a region or a country to another, using their respective competencies and qualifications to the best effect. In order to best face the challenges posed by contemporary society, adjustments have been made over the years in order to adapt the Strategy to the economic evolution and the structural transformations that are currently underway, aiming to respond to the strategic challenges facing Portugal in this respect, as well as to foster a culture in which every citizen in our country really takes the lifelong learning concept to heart. The present report allows the identification of relevant progress in most areas covered by the Strategy, taking naturally into account the starting point of the country, in particular the low levels of education and training reached by the majority of the population, and also clearly stating the necessity to deepen and accelerate the rhythm of that progress.

The Strategy's implementation faces a variety of obstacles, namely the persistence of high levels of school failure and, consequently, early school leaving, the large number of poorly qualified adults and the ageing of the population. That diagnostic mandates that:

- Learning outcomes amongst young people continue to improve, as levels of school failure and, consequently, early school leaving are high, with negative consequences towards the general levels of education and training of our adult population.
- Adult participation in education and training actions continues to grow and to become balanced, in that as a general rule it is the people with the least schooling, the oldest members of the population, rural residents, and the disabled who participate least.
- The quality of the initial framework of educational opportunities that were offered overcomes some fragilities, producing learning results more homogeneous and more pertinent in certain key areas, valuing the recognition and validation of all forms of learning – something that is essential if we are to motivate adults, households and enterprises to take part in the lifelong learning process.

In its transversal dimension, the National Lifelong Learning Strategy seeks to reach every age group and to include every form of education, training and learning in formal, informal and non-formal environments, thereby justifying the definition of Lifelong Learning (LLL) as a culture in which every citizen learns "from the cradle to the grave". Portugal has thus decided to bet on and invest in the qualification of the Portuguese population, by promoting a lifelong learning culture that reduces the existing deficit of qualifications, increases equity, stimulates and responds to the need to strengthen innovation and entrepreneurship, and reduces the disparities in competencies in the labour market.

A number of initiatives have been launched in response to all these challenges, which on the one hand involve the low level of qualification of the active members of the Portuguese population, and on the other the high rate of early school leaving:

- Extending the coverage of the preschool education network, including extending the opening hours of kindergartens.
- The Reform of the Basic Education System, with particular attention to the 1<sup>st</sup> cycle, which includes:
  - Generalising the teaching of English in the 1<sup>st</sup> cycle. The initial goal of covering 25% of schools (50,000 students) in the 2005/2006 academic year has been substantially exceeded. Around 98.9% are currently covered by this measure, and it is expected that the Programme will be extended to the others in the 2007/2008 academic year.
  - Extending the operating hours of schools in the basic education system, as a measure to invest in full-time schooling.
  - Launching the programme that will generalise school meals for 1<sup>st</sup> cycle students.
  - A programme of educational complements and social support designed to recover students who display learning difficulties.
  - A training programme in mathematics for teachers.
  - Making improvements in the way teaching work is organised, thereby ensuring that students are not left to their own devices if a scheduled lesson does not take place, that paths leading to academic failure are detected early and that such cases are accompanied by the implementation of appropriate intervention instruments, such as recovery plans or alternative curricular paths.
  - Promoting the integration of students of other nationalities, particularly by developing and undertaking activities that support students whose mother tongue is not Portuguese.
  - Creating an Observatory to watch over the safety and security conditions in schools.
  - Beginning a process of rationalising the network of schools.
  - Connecting every school in the country to the Internet via broadband (completed in 2006).
- The New Opportunities Initiative (see Chapter 2), which (among other measures) has established the following goals:
  - Make the 12<sup>th</sup> grade the minimum framework of reference for training for all.
  - Place half the young people in secondary education on technological and vocational courses.

- Guarantee that, by 2010, 25% of the offers in education and training to young people will be through vocational paths (vocational courses, courses offered by the educational system, education and training courses, technical and artistic courses), covering 650,000 young people by that time.
- Qualify 1,000,000 active members of the population by 2010.
- Extend the framework of reference for key competencies used in the system for the Recognition, Validation and Certification of Competencies (RVCC) to the 12<sup>th</sup> grade and consolidate and expand the network of New Opportunities teams or Centres by 2010 up to 500, integrating schooling and professional RVCC procedures.
- Negotiate with the social partners to create the conditions needed to make it viable for active employed people to participate in training paths.
- Mobilise enterprises and business associations behind the training of their active staff.
- Strengthen the education and training system within the framework of lifelong learning (LLL), by creating the conditions needed for qualifications to be transparent, promoting the quality and efficiency of the education and training systems, diversifying learning opportunities and developing new LLL methods.
- Change the practices employed by training bodies and professionals, thereby actively contributing to the professionalisation, specialisation and increased quality and efficacy of training interventions, and improving the articulation between the institutions involved.
- Promote both the use of ICT within the context of the new LLL methods, the accountability of the different actors, and the training and certification of ICT competencies, thereby facilitating the availability of opportunities for a diverse range of audiences in accordance with their needs and expectations; ensure that every participant in basic ICT competency training has an e-mailbox; and implement the national ICT competency certification system.

Within the political framework set above, particular emphasis should be put on the measures designed to raise adult qualification levels, especially: the generalised implementation of the Recognition, Validation and Certification of Competencies (RVCC) at the level of the 9<sup>th</sup> grade and the work to prepare the process of extension of the reference framework of competencies that is to be applied by the RVCC Centres, now called New Opportunities Centres, and on the Adult Education and Training (EFA) Courses to the 12<sup>th</sup> grade level; the expansion of the RVCC network, integrating the schooling and professional components; and the opening of higher education institutions to new publics, both through the new regime for the access of people over 23 years old to higher education and through promoting Technologic Specialisation Courses, a post-secondary training level, namely in Polytechnic Institutes.

The National Lifelong Learning Strategy is also present in the priorities and policies laid down for higher education in Portugal. In order to develop the competencies needed for the knowledge-based economy and society and to achieve economic competitiveness, factors that are vital to Europe's social cohesion and the full application of the renovated Lisbon Strategy Agenda, the process for the reform of higher education is under way, within the context of the present movement for the modernisation of universities and the non-university higher education sector. This reform includes a number of measures, mobilising higher education institutions, households and enterprises, and aim at:

- Ensuring the recognition of the qualification of Portuguese people within the European Higher Education Area, implementing the Bologna Process, a unique opportunity to increase enrolment in the higher education system, thereby improving the quality and relevance of the training it offers and fostering mobility and internationalisation;
- Promoting equal opportunities in access to higher education, improving frequency and conclusion levels in higher education courses, attracting new publics, within a logic of Lifelong Learning and promoting Social Academic Action;
- Ensuring the correct regulation of the higher education system, namely its organising principles, the autonomy of Universities and Polytechnic Institutes, the principles for the organisation and management of institutions and their assessment, including institutions and degrees, as well as ensuring the best conditions concerning teaching and research careers;
- The definition of objectives not only in terms of education/training levels, but also in terms of professional profiles that are in short supply on the labour market.
- Diversifying learning opportunities, as well as increasing opportunities for vocational conversion to new jobs;
- Improving the articulation between the institutions that promote lifelong learning, thereby fostering the sharing of resources and the promotion of combined education/training solutions.

The investment in qualifying the people of Portugal will continue in 2007 and will be conducted in the light of both the objectives laid down by the Portuguese Government and the framework created by the National Action Programme for Growth and Employment (PNACE) and the National Action Programme for Inclusion, among others.

The main measures designed to achieve the prime objectives of the Major Options of the Plan for 2005-2009, which began to be implemented in the 2006-2007 academic year, are thus to:

- Combat academic failure and early school leaving, and place schools at the service of their students' learning. In this respect the reforms targeted at reorganising the network of 1<sup>st</sup> cycle schools, improving teachers' qualifications, and increasing the offer of training for young people who have not completed their compulsory education by the age of 15, will continue. Also in this area, the remodelling of the secondary-level training of a vocational and professionalising nature is ongoing and is designed to turn secondary education into the level of reference for the qualifications of the Portuguese population.
- Expand lifelong learning opportunities, thereby taking advantage of the full potential of the New Opportunities Initiative, including diversifying the offer of Adult Education and Training Courses, reorganising recurrent education, and expanding the network of RVCC Centres.
- Conclude the reform of higher education, ensuring that the future generations are qualified to meet the demand of the European area, promoting equal opportunities in access to higher education, improving frequency and conclusion levels in higher education courses, attracting new publics and improving Social Academic Action, and also ensuring full integration and qualification of Portuguese higher education institutions within the European area.

As part of the process of increasing the Portuguese population's employability, we want to improve the level of young people's qualifications (135,000 young people to be covered in 2005/2008), and to make the transition to the active life easier for young people with higher level qualifications, thereby improving young people's integration into the labour market and bringing their competencies closer to the needs of enterprises (108,000 young people to be covered in 2005-2008, 25,000 of them on professional traineeships each year).

In order to make these measures, actions and reforms more visible and publicise them widely, they were designed on the basis of a broad consultation with all the actors involved, followed by the widespread dissemination of the results, particularly by:

- Presenting the results of the assessment and monitoring the implementation of the reform of the secondary education system, and making such adjustments as proved necessary.
- Making the new model for the assessment and certification of schoolbooks a reality, so as to ensure their quality and reduce the financial burden they represent for families.
- Beginning the process of generalising the assessment of schools, based on the frameworks of reference and the recommendations drawn up by a working group that was formed especially in order to work out the frameworks of reference for the self- and external assessment of schools, as well as the conditions needed to increase the autonomy of schools / groups of schools and to transfer competencies to local authorities. These frameworks of reference were applied to a set of 24 schools / groups of schools in 2006, and this pilot assessment project will lead to recommendations that will in turn make it possible to enter into autonomy contracts.
- Identifying the mechanisms for the strategic regulation and definition of a new funding model for the subsystem that provides professionally qualifying opportunities.
- Creating instruments that ensure accountability, the transparency of management and accounting procedures, and efficiency, thereby improving the quality of the reform of higher education institutions.
- Launching a campaign to provide information about and publicise the training that is on offer and to promote the enhancement of the value that society attaches to school and to vocational qualifications.
- Establishing protocols with local authorities and charities (IPSS), with the objective of continuing to expand the preschool education network and consolidate the extension of its operating hours.

This effort to involve the Portuguese society in the challenges posed by LLL, targeting in particular the creation of more favourable conditions for the implementation of the strategy set up within the framework of the New Opportunities initiative, is also marked by the recent establishment of an agreement between the generality of the social partners belonging to the Permanent Commission for Social Concertation. The implementation of the commitments stemming from this agreement is in march, and will translate in a deep change in the present system of training and professional certification, aiming at a more integrated system for LLL.

Concerning these matters, we must also underline the protocols established with enterprises and other entities within the framework of the New Opportunities initiative, allowing the qualification of their active employees and covering already 100,000 actives in training actions and RVCC processes.

This set of measures is also transversally followed up by the consolidation of a culture of demanding standards and a widespread practice of self assessment by learning institutions, students, pupils and other educative agents.

## CHAPTER 2 – EXECUTION OF THE TRANSVERSAL POLICY OBJECTIVES

### 2.1. The establishment of national qualification systems and frameworks (in line with the European Qualifications Framework) and the elimination of the existing obstacles between levels and systems

#### A. The New Opportunities Initiative

The **New Opportunities Initiative** (INO) – that part of it which falls within the framework of the joint actions of the Ministries of Labour and Social Solidarity and Education – represents a decisive move forwards in the strategy to qualify the Portuguese population, in that it is a determined political intervention strategy with specific, ambitious goals designed to achieve a society that is fully developed in every respect. It has been defined along two axes, which are directed at different audiences: young people with low levels of schooling, and adults whose basic levels of qualification can be improved (Table 2.1):

The execution of the Initiative has exceeded its goals, particularly in relation to young people in terms of the offer of dual certification opportunities (120,000 people covered in 2006). The investment in vocational learning (560 classes and 23,500 students in 2006/07, compared to 73 classes and 12,000 students the year before), and also the expansion of the education and training courses for young people, have made a decisive contribution in this respect. On the adult side, lifelong learning (LLL) opportunities have been promoted via the offer of adult education and training (EFA) courses (20,000 people covered) and the extension of the times at which classes are available after working hours.

#### B. The Agreement on the Reform of Vocational Training

We should note the importance of the approval of the Agreement on the Reform of Vocational Training (ARFP) and its signature with the social partners, while an instrument to support the strategy for the qualification of the Portuguese citizens, as defined mainly within the framework of the New Opportunities initiative, particularly as regards the following measures<sup>1</sup>:

- Establish the legal rules for the National Qualifications System (SNQ) and define the organisational structures that will operate it, by creating the National Qualifications Catalogue and the Individual Competency Dossier as an instrument that will make it possible to record the competencies people acquire as they invest in training over the course of their lives, as well as the competencies they acquire by non-formal or informal means.
- Apply the dual certification principle to young people and above all to employed adult members of the active population, without requiring them to follow a complete education and training path, but rather enabling them to take modules of a dual certification path that provides credits towards academic and/or vocational certification.
- Establish the principles of the System for Regulating Access to Professions (SRAP), which defines the content of the rules governing the access to the exercise of given professions when public interest thus demands it, namely by reasons of hygiene and health of individuals or concerning safety of persons and property, by regulating the organisational structures that are responsible for preparing, monitoring and assessing those rules.
- Reform the Accreditation and Quality System (SAQ) for training bodies, thereby turning it into an effective quality certification system.
- Improve trainer qualifications, by reforming the existing National Centre for the Training of Trainers (CNFF).
- Make the right to training, as it is set out in the Labour Code (CT), a reality.
- Increase the social partners' involvement and participation in the monitoring and stimulation of workers' vocational training.

The recognition of learning outcomes is a clear aim of the national qualification system, reflecting an important change in the way of conceiving and describing qualifications, by allowing their comparison according to their corresponding competencies and not according to the methods or pathways of learning and training through which they were acquired. This fact, allied to the valuing at an equal level of the competencies obtained in formal, informal or non-formal learning paths, made necessary a framework allowing for their comparison, independently from the way they were acquired.

The National Qualifications Framework, currently undergoing a process of public consultation, will thus allow that individuals and employers will have a more exact perception of the value of qualifications, immediately contributing to the better management of the labour market. Besides, the fact that people are increasingly mobile, especially within the European area, concur to the fact that they increasingly acquire their qualifications in different countries and circulate within the different national labour markets, making necessary the establishment of a common reference framework allowing for the comparison of qualifications, adopting the principles of the European Qualifications Framework, allowing for an easier comparison between the national qualification systems of the different Member States, according to the recommendation for the establishment of such a framework, in an advanced state of redaction within the European Union.

The **National Qualifications Catalogue** (CNQ), whose first version is available for discussion and improvement, will serve as a reference for initial and continuous vocational training for virtually all training bodies, especially those which apply for funding, integrating, in addition to the frameworks of reference for training organised into Short Duration Units (25 to 50-hour training modules), the professional profiles and the criteria for the corresponding RVCC processes. The Catalogue is dynamic in nature – each profile and framework of reference must be updated at least every two years – and, with the necessary adaptations, will be

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<sup>1</sup> This list does not include the RVCC system and the National Qualifications Catalogue, which are covered separately below.

used in every form of dual certification vocational training for young people and adults, namely the learning system, vocational courses, Education and Training Courses for young people, Adult Education and Training Courses, and certified modular training for both employed and unemployed members of the active population).

The CNQ is an instrument for strategically managing qualifications, and will help increase:

- The coherence, transparency and comparability of qualifications at both the national and international levels, reason why it is being developed in harmony with the European Qualifications Framework and structured in the perspective of the European Credit System for Vocational Education and Training (ECVET);
- Flexibility in obtaining a qualification within the context of the promotion of lifelong learning for all;
- The recognition of qualifications, whatever paths were used to access them;
- The quality of the education and training system;
- The information and guidance counselling given in relation to training and employment;
- The creation of qualifications/competencies that are essential to the competitiveness and modernisation of the economy.

### **C. Higher Education**

We have defined a framework of qualifications for Portuguese higher education that comes under the umbrella of the creation of the European Higher Education Area and the Bologna Process, but this is not covered in this Report.

#### **2.2. The recognition validation and certification of non-formal and informal learning**

Where the New Opportunities Initiative is concerned we would particularly mention the fundamental role played by the RVCC system, which has been consolidated and expanded in accordance with the planned goals and schedule. The network already has 269 New Opportunities Centres (170 more than it did when the Initiative began). The aim is to reach the target of 500 Centres (or teams that are qualified for this purpose) by 2010. Both active members of the population and employers have been mobilised by means of around 500 protocols with local authorities, IPSS charities, enterprises and other bodies. These protocols cover more than 100,000 active people in employment, and we are organising a campaign in the country's main media to further publicise the Initiative.

The RVCC system seeks to ensure that the offer of training matches the needs of both businesses and workers, attaches added value to learning by experience, and makes it possible to structure coherent training paths. The system is thus the doorway *par excellence* both to the qualification of active members of the population, and through the guidance of the vocational training of active people towards dual certification offers.

More than 250,000 people are already registered for an RVCC process, of which 75,000 of them at the secondary level, and nearly 100,000 had already been certified at the basic level. The majority of the active people who ask for an RVCC process are employed and belong to the 25 to 44 year-old age group. Women and the Northern and Central Regions are the main sources of the demand for RVCC processes.

In the meantime the system has been extended to the secondary level and to vocational competencies, over and above scholastic competencies, thereby enhancing the RVCC system's integrative framework and its dual certification logic. As part of the Agreement on the Reform of Vocational Training, the vocational RVCC system will be ready to be operationalised at the beginning of 2008 in a way that will be integrated with the same type of process for scholastic competencies. It is currently being tested for 16 career outlets and the plan is to extend it to all the outlets included in the National Qualifications Catalogue.

#### **2.3. The creation of widely accessible guidance policies and systems**

In recent years the growing recognition of the importance of guidance counselling to lifelong learning, and of making it accessible to more people, has particularly resulted in a concern to increase the links between the various national guidance counselling systems created by different programmatic documents. The National Employment Plan for 2005-2008, also within the framework of the New Opportunities Initiative, strengthened an instrument which helps to ensure that people acquire the competencies they need to learn and develop new competencies and to make sure that they have a solid education and training. This instrument is the lifelong Integrated Academic and Vocational Information and Guidance Counselling System. It primarily articulates the work of the New Opportunities Centres, the Ministry of Education's Psychology and Guidance Counselling Services (SPO), the Vocational Information and Guidance Counselling Services (SIOP), which come under the authority of the Ministry of Labour and Social Solidarity, and the Active Life Insertion Units (UIVA). Within the context of the construction of this more articulated system, we should note the development of the Integrated Training Opportunity Information System (SIGO), which is a fundamental support instrument for the following-up and counselling of both young people and adults.

Within the framework of the implementation of the employment and vocational training policies, guidance counselling interventions for people aged 15 and above are promoted. These interventions can occur at any point in the person's life, but are more frequently used when people are unemployed or in the transitional period between school and the labour market. The work with employed active members of the population has been growing in extent. The type of guidance intervention varies depending on a person's career situation, but the priority is to develop employability. This particularly involves promoting an investment in training, by giving people support that that will help them to both gain access to training paths which are diversified and increasingly complex. Also in order to capitalise more effectively on the orientation towards lifelong learning, the possibility of establishing a national guidance counselling forum, as part of the creation of the European guidance counselling network is currently under consideration.

The Portuguese higher education system has been given new mechanisms for making access to higher education by new audiences simpler and more flexible. This is particularly aimed at people who do not possess a secondary level or equivalent course, but who provide especially good evidence of their ability to move on to higher education. These are students above the age of 23, who are credited for their professional experience (where applicable) and training from a lifelong learning perspective by being awarded credits towards their study cycles. This practice has made the system more flexible, by making each institution responsible for selecting its students, using applicants' life experience as the most important criterion. It has broadened the catchment area for new higher education students and has made it possible for more, and a more diverse range of, people to receive higher education. Table 2.IV describes students' participation in the aptitude tests for higher education places reserved for those over the age of 23.

The opening up of Portuguese higher education institutions to new publics was additionally made by the promotion of post-secondary training courses (CET), particularly in Polytechnic Institutes, made viable by the new legal framework of such courses. Table 2.V describes the evolution of the number of people enrolled in those courses, as well as the total number of students/trainees in 2005 and 2006.

It was also necessary to alter both the procedures that enable students from foreign higher education systems to take initial training courses in the Portuguese higher education system, and the mechanisms whereby students can move from one Portuguese higher education establishment to another (transfers and changing courses). Here too it is now possible to transfer and accumulate credits based on the principle of the recognition of the value of the learning acquired in formal, non-formal and informal contexts.

#### **2.4. Measures to reinforce transnational mobility in all sectors, including by removing administrative and legal obstacles, implementing Europass, or providing financial or other types of support**

The main measures implemented towards strengthening transnational mobility can be synthesised as follows:

- Implementation of **EUROPASS** (Table 2.VI);
- Beginning of the generalised issuing of the Europass Diploma Supplement;
- Drawing up of a new set of legal rules for the **Recognition of Foreign Higher Education Degrees** (RGASE), which will do away with a major obstacle to the circulation of graduates by providing for the needs of all those who have obtained their academic qualifications abroad and want to work in Portugal.

In 2005 and 2006 Portugal received a total of 809 requests for equivalencies / the recognition of diplomas obtained abroad by Portuguese citizens. Of the 809 requests, 50 concerned PhDs, 165 Master's Degrees, 520 full Bachelor's Degrees (*Licenciatura*), and 74 short Bachelor's Degrees (*Bacharel*), as shown by Table 2.VII.

NARIC also received 124 requests for the registration of PhDs obtained abroad by Portuguese citizens in 2005, and 113 such requests in 2006. The most common countries of origin of these degrees were the United Kingdom, followed by Spain and France. The subject areas with the largest numbers of requests were Health, Architecture, the Social Sciences, and the Economic and Business Sciences.

Within the overall framework of the Lifelong Learning Programme, at the higher education level a clear guideline has been laid down for the Portuguese higher education system to become increasingly internationalised and articulated within the European area, particularly by fostering the mobility of both students and teachers. In this respect the **ERASMUS** sub-programme is taking on a very special significance within the context of the recently launched **Lifelong Learning Programme** (Table 2.VIII).

We should also mention the range of activities that is being undertaken within the scope of the **EURES network**. These are designed to support worker mobility as an integral part of the public employment services, thereby helping to ensure both a greater transparency and a reduction in the segmentation of the European labour market. One important highlight has been the start-up of both the **EURES Portal**, which has made it possible to publicise virtually all the Portuguese job offers that are communicated online at a European level, and has thus helped to increase the number of vacancies on the European website to more than one million, and the NETemprego Portal. It is also worth noting the set of 8 **transnational recruitment projects** which have been developed and mediated by the EURES Counsellors from the countries concerned, and which have already made it possible to place 172 Portuguese workers in countries like France, the United Kingdom and Spain. One particular highlight is a mobility project in the teaching sector, which involves Portugal and the United Kingdom and has made it possible to directly place 27 Portuguese teachers, a segment of the labour market that is simultaneously highly qualified and suffering from growing unemployment problems – in the latter country. Another example is the participation in **Job Fairs** and other events that supply information about issues linked to worker mobility with a view to raising awareness among workers and the population in general about the potentials, advantages and challenges of mobility in the European labour market.

In Portugal the **National Qualifications Reference Point** (PNRQ), accessed through the portal of the Institute for Employment and Vocational Training (IEFP) has been publicised among bodies and professionals which/who routinely deal with issues linked to professional and geographic mobility. In 2006, around 30 sessions to publicise the PNRQ were organised, thereby providing a constant flow of information about education, training and employment and making it possible to improve the quality and mobility of our human resources.

## CHAPTER 3: IMPLEMENTATION OF POLICY OBJECTIVES IN SCHOOLS, HIGHER EDUCATION, VOCATIONAL EDUCATION AND TRAINING, AND ADULT LEARNING

### **3.1 Elements to be reported on for all levels (basic and secondary education, higher education, vocational education and training, and adult learning):**

#### *3.1.1 Governance and leadership of education and training institutions (organisational and administrative reforms, autonomy and accountability measures, and public and private initiatives)*

The Agreement on the Reform of Vocational Training (ARFP) is a decisive step towards improving the vocational education and training system in Portugal, in that it fosters the involvement of the social partners in making the collective bargaining about vocational training more dynamic. In addition there is the the creation of the National Qualifications System (in the framework of a renewed institutional frame) and the System for Regulating Access to Professions (renewing the present national system for the certification of qualifications). This prioritises the simultaneous revision of the priorities and the financing model for vocational training, so as to concentrate funds on training provisions and formats that reflect frameworks of reference which are critical to the modernisation of our enterprises, are set out in the National Qualifications Catalogue, and involve dual certification in a lifelong learning context.

Result-assessment criteria have been brought into the allocation of training funds, in such a way as to stimulate the assessment of both the investments that are made in training and its quality. Backing is concentrated on the agents that offer the best response. The mechanisms for contracts with training bodies will be developed in such a way as to ensure a greater/better ability to respond to the objectives of the public vocational training policies.

Finally, we should note the creation of hubs of excellence based on training operators who stand out for the quality of their training interventions.

As part of the higher education reform, a new set of regulations governing the creation, attributes, organisation, operation, organisational responsibility, and public inspection of higher education institutions has recently been approved. The main options of this reform are as follows:

- The adoption of a demanding international framework of reference for the development and quality of the Portuguese higher education system;
- An increase in the specialisation of the dual system, thereby clarifying the different natures and objectives of Universities and Polytechnics;
- The institutional consolidation and integration of the Polytechnic Institutes, which are thus no longer federations of separate, autonomous schools – and the strengthening of the Polytechnic Institutes' geographic and professional bases;
- The introduction of a diverse range of legal statuses for the various public institutions, with the creation of private-law public foundations that follow the example set by some of the best international practices;
- The restriction of the legal status of bodies that create private teaching establishments, which cannot be joint stock companies;
- The definition of demanding common requirements for the creation and continued existence of higher education institutions, particularly in terms of appropriate levels of full-time PhD holders among their staff, to depend on the size and nature of each institution, but to be identical for public and private establishments;
- The option to combine institutions of the same nature in consortia with integrative functions, together with the creation of other mechanisms for reorganising the training network and the opportunities it offers;
- The assurance of flexibility and diversity in the internal organisation of higher education institutions, particularly in terms of their specific organisational units, which will be able to adopt different forms and natures;
- The reform of the system of governance of public institutions in accordance with international good practices, thereby ensuring greater accountability and decision-making capacity on the part of the people in charge of them;
- The explicit recognition of both the role that students' associations and associations of ex-alumni have to play in stimulating the quality of higher education, and their relationship with social, economic and cultural life;
- An increase in the accountability of the managers of public higher education institutions, and the restriction of the consecutive terms of office of senior managers to eight consecutive years, thereby immediately promoting their necessary renewal;
- The requirement for a consolidated accounting for disbursements and income and a complete statement of cost structures, together with the appointment of a single auditor in every institution and the performance of periodic external audits, the reports on which will be made public;

#### *3.1.2 Stimulating private investment by enterprises, households and individuals*

As part of the New Opportunities Initiative and in order to permit the development of the full potential of the RVCC system and guidance to education and training offers, both active members of the population and employers have been mobilised in such a way as to stimulate their involvement in the system, through the signature of 477 protocols covering more than 100,000 active employed persons, with enterprises, business associations (AEP, business associations from the Braga District) and other public bodies, such as local authorities, police forces (PSP, GNR) and the army.

In Portugal the State undertakes to guarantee generalised access to higher education by means of a social action and educational support system. This contribution can be both direct (via the award of a grant) and indirect (access to meals and accommodation, health services, cultural and sporting activities, or other forms of educational support).

With the reorganisation of the higher education social action system, as well as creating a student loan guarantee system, the idea is to ensure that no student who has the ability and an interest in the scientific and technological fields stops studying or limits his/her choice of learning institution for financial reasons.

Through the application of one of the criteria of the higher education assessment system – the existence of ties to the community generated by the provision of services and cultural work and activities – higher education establishments are being given an incentive to look for income of their own. This in turn means that they are attaching added value to international and inter-institutional cooperation and links with the community. The existence of partnerships is also one of the criteria for assessing higher education institutions, which can receive additional public funding if the assessment is positive.

In this context, attention should be called to the new international partnerships in higher education and in Science and Technology launched by the Government, involving Portuguese and foreign universities, research institutions and enterprises, around specific programmes of a scientific character and leading to post-graduate degrees, namely with:

- *Massachusetts Institute of Technology (MIT)*, focussing in the thematic areas of Energy, Transportation, Design and Production and Bioengineering. The MIT-Portugal programme was then launched;
- *Carnegie-Mellon University*, in Information and Communication Technologies, launching then CMU-Portugal Programme and the “*Information and Communication Technologies Institute*”;
- *University of Texas at Austin - Digital Contents and commercialisation of technology*, launching the UTAustin-Portugal programme.
- *Fraunhofer Society*, in logistics, new technologies, applications and services for large spaces where people gather, virtual and enhanced reality applied to engineering design, biotechnology and nanotechnology.

Other international partnerships are being set, namely with reference European Science and Technology institutions and universities, aiming at fostering the internationalisation of universities and stimulate international excellence in R&D activities and higher education and training in cutting edge science and technology fields, as well as the economic valuing of knowledge.

What is more, via the System of Tax Incentives for Entrepreneurial Research and Development (SIFIDE), enterprises that are not financially supported by the State can deduct a significant percentage of their R&D expenditure from the amount of income which forms the basis for the calculation of Corporation Tax (IRC). With a view to supporting both expenditure on in-house R&D and the acquisition of R&D from specialised institutions, the State is going to create a stimulus that is designed to increase cooperation between the business world and universities and R&D institutions.

### *3.1.3 Widening access to education and improving the equity of the participation, treatment and outcomes therein/of, especially for the most disadvantaged groups, such as emigrants, ethnic minorities and people with special needs*

Here we should mention the extent to which Education and Training Courses for young people and vocational courses are now available as dual certification education/training paths – in 2006 more than 115,000 young people were covered by offers of secondary-level training, and more than 23,000 by offers at the level of the 3<sup>rd</sup> basic education cycle.

In 2006, more than 150,000 young people were enrolled in vocational courses, at basic level and especially at the secondary level, 120,000 of which in courses leading to the conclusion of secondary education and obtaining a vocational qualification of level III, according to the level structure adopted by the European Union – largely surpassing the set target. This growth allowed raising the percentage of young people participating in secondary education through vocational paths, either within the network managed by the Ministry of Education or within the network managed by the Ministry of Labour and Social Solidarity, going from 31% in 2005 to 36% in 2006.

The *Plan for the Integration of Immigrants (PII)* sets out a variety of measures designed to improve access to education and training. Among other things, these particularly include adapting strategies for providing schooling to the specific needs of students whose parents were immigrants, involving sociocultural mediators in the school environment, strengthening the education offices at the National Immigrant Support Centres (CNAIs), and applying the RVCC system to immigrants, amongst others. Where labour, employment and vocational training issues are concerned, we should note: the specific training that job centre staff are given in relation to the integration of immigrants into the labour market (particularly via the Intervention Programme for Unemployed Immigrants - PIDI); the new rules for recognising foreign higher education degrees (see 3.3.); the increased ease of access to the Portuguese higher education system for students who have already attended higher education abroad; the incentive for Portuguese employers and workers to take social responsibility for the full integration of immigrant workers into the labour context; and the incentive for entrepreneurship among immigrants.

The *Action Plan for the Integration of Persons with Disabilities or Incapacities (PAIPDI)*, which is in effect until 2009, sets out a range of measures and actions designed to promote the rehabilitation, integration and participation of the disabled in society. In addition to its specific measures, this Plan aims to foster the interest and raise the awareness of society in general in relation to disability issues, thereby eliminating discriminatory preconceptions and attitudes. It involves three major areas of action: a) accessibilities and information; b) education, qualification and employment; and c) dignified housing and living conditions.

In areas concerning education, qualification and employment, the PAIPDI integrates actions towards helping disabled or incapacitated people to successfully access and attend education and training since pre-school to higher education, namely through:

- i) The compatibilisation and unification of technical help given to students within educational structures;
- ii) Develop a new legal framework governing the support aimed at students with permanent special education needs;
- iii) Set up a specific legal regime to adequately support special needs students participating in higher education, both public and private;
- iv) Set up conditions to access training courses targeting the general population under the responsibility of training institutions under the tutelage of the Ministry of Labour and Social Solidarity and the Ministry of Education, in partnership with specialised resources centres accredited by the Institute for Employment and Vocational Training;
- v) The setting up of six New Opportunities Centres dedicated to the development of RVCC processes targeting publics with specific handicaps, creating methods adapted to their needs.

PAIPD also allows for actions concerning the transversal inclusion of the disability issues within the National System of Science, Innovation and Technology, increasing the development and undertaking of research studies and projects in the Rehabilitation and Accessibility Engineering field, support training in Rehabilitation and Accessibility Engineering by creating bachelor's degrees and post-graduate courses in this field, and also stimulating the existence of a National Network of Rehabilitation and Accessibility Engineering Professionals and Centres

From the social point of view, today's students are quite heterogeneous and there are large economic and cultural differences between them. Another aspect of this heterogeneity is the academic level of their parents. It is therefore essential to progressively eliminate quantitative restrictions of a global nature, such as the **numerus clausus in higher education**, and to create the conditions needed to ensure that in overall terms both existing and future courses match the needs for qualified staff, individual aspirations, and an increase in the country's educational, cultural and scientific level, thereby preventing the discriminatory effects of those inequalities.

Portugal's participation in the **EUROSTUDENT** programme, which seeks to study and understand the socioeconomic life situation of higher education students in Europe, has been reflected through the funding and supervision of the respective consultation, conducted by a research institute.

Another important area concerns **people with special educational needs**. First of all, and at the level of the national competitive applications for admission to higher education, there are no restrictions whatsoever on access for people with special educational needs. Amongst other things, a number of places are especially reserved for persons with physical or sensorial disabilities.

A protocol has been signed with the country's higher education institutions, with a view to: - Definitively adopting the term Persons with Special Educational Needs, instead of Disabled Persons; - Broadening the concept of students with physical and sensorial disabilities; - Increasing the number of places reserved for this category of candidates; - Providing timely information about the entry of students with special educational needs into higher education institutions (IESs); - Physically restructuring academic buildings; - Acquiring specific equipment.

We can also include two other situations in this context: **ethnic minorities**, on whom the national framework governing higher education does not impose any restrictions; and **emigrants**. Where the latter are concerned, we should note that the national higher education application system reserves a number of places especially for Portuguese emigrants and their family members. The legal framework governing this system has recently been revised and the access conditions applicable to such students have been made much easier. The National Commission on Access to Higher Education (CNAES) has been addressing one aspect of this policy of opening up new opportunities for access to higher-level studies, accepting final exams in foreign secondary education subjects as substitutes for the national exams that constitute subject-specific tests for access to Portuguese higher education places.

#### 3.1.4 *Measures to address gender equality aspects in education and training*

The National Equality Plan 2007-2010 aims to: increase the efficiency of both the public policy instruments that promote equality between men and women, and their system of governance; disseminate gender equality values via education and the provision of information; promote equal opportunities in the access to and participation in the labour market, by combating horizontal and vertical segregation and unequal salaries; promote the reconciliation of work, family and personal life, by prioritising the creation of conditions needed to ensure parity in the harmonisation of professional and family responsibilities.

#### 3.1.5 *the use of learning-outcome-based approaches to define and design education and training objectives, frameworks of reference and curricula, and their relevance to the needs of society and the economy*

The ongoing national qualification strategy promotes the acquisition of both transversal and specialised competencies from a lifelong learning perspective. It does so in formal, non-formal and informal contexts, which at the European level are incorporated into the European Qualifications Framework and the European System of Credits for Vocational Education and Training.

The recent adoption of the National Qualifications Catalogue strengthens this approach, as it is already, in a great extent, structured towards the definition of training reference levels through learning outcomes, and aims to cover the competencies and training profiles which are strategic to the economic and social development of the country.

### 3.1.6 Quality assurance systems

The Agreement on the Reform of Vocational Training calls for the reform of the Accreditation and Quality System, which will come to incorporate the Portuguese Quality System (SPQ), thereby promoting the association of the seal of quality with the process of accrediting training bodies, and perfecting the existing framework of reference for quality, particularly via the creation of a pool of external auditors. The simplification of the accreditation process – namely by reducing both the diversity of the accreditation profiles and the amount of bureaucracy in the application process – and the creation of an Accreditation and Quality System Monitoring Committee (CASAQ), with representatives from the social partners and an operational model that will be decided within the framework of the National Vocational Training Council (CNFP), are other measures that fall within the scope of the reform of the Accreditation and Quality System.

In addition, the results assessment model associated with the quality certification process will be consolidated by the addition of a comparable assessment of trainees' post-training paths.

Within the framework of the European higher education quality assurance system and with a view to internationalising Portuguese higher education and increasing its quality, the Government has seen fit to create a private-law foundation called the **Assessment and Accreditation Agency for Assuring the Quality of Higher Education**. This body will be responsible for the procedures – particularly the assessment and accreditation ones – used to ensure the quality of higher education, and within this context, for Portugal's incorporation into the European higher education quality assurance system and the generic internationalisation of the country's universities and polytechnics.

The Agency is organised around four axes, which are linked to: extending the assessment process to the performance of higher education institutions; making the assessment criteria objective, translating the results into qualitative, aspect-by-aspect assessments that can be compared with one another, and clarifying the consequences of the assessment process, both for the way in which courses and learning establishments function and for their funding; the internationalisation of the assessment process, particularly its institutional assessment aspect; and the requirement that universities and polytechnics put their own, certifiable quality assurance systems into place.

It is within this context that the reform of the process of assessing and accrediting the Portuguese higher education system will take place.

### 3.1.7 *developing learning partnerships with the main stakeholders (national, regional and local policy-makers, social partners, learners and civil society representatives).*

The Agreement on the Reform of Vocational Training was reached following an in-depth process of social dialogue. In the latter the social partners restated their commitment to undertake actions designed to promote collective bargaining on vocational training, so as to establish differentiated sectoral plans and include continuous training as a priority issue in the bargaining process, and also to recognise the need for enterprises to draw up annual / multi-annual training plans for their staff.

Within the New Opportunities initiative – in a joint action of the Ministry of Education and the Ministry of labour and Social Solidarity – several partnerships have been established with major enterprises and union associations, involving more than 100,000 employed people.

In general terms, all higher education institutions engage in interactions with the business community, namely through their research centres and the development of R&D consortiums, within the present and extended network of Knowledge Transfer Support Offices and also through new education partnerships in the field of Science and Technology, as referred to in 3.1.2., actively involving enterprises and their human resources in advanced training courses and research. In some cases they have business “incubators” of their own, which are aimed at producing established spin-offs based on research centres.

## **3.2 Schools**

### 3.2.1 *Increasing the investment in and strengthening pre-primary education*

The objectives that were set out in the previous report still hold sway. It is possible to achieve the goals that were laid down by 2009, above for the 5-year-old age group. The investment in preschool education is being made not only by increasing the percentage of children covered – an aspect which the last report focused on – but also by investing in curricular innovation and development at this level of learning. In this respect, in 2007 a preschool intervention was initiated which on the one hand is intended to increase the quality of the contents of the education on offer, and on the other to bring preschool education closer to the basic education cycle, by adopting priorities for curricular guidelines that are similar to those for basic education.

This investment thus entails an intervention on two levels. One takes the form of an experimental project and is designed to test and implement a project that will assess quality in preschools. This project focuses on an analysis of the pedagogical work and on self-assessment processes. It also implies training kindergarten teachers. It has applications in all five of the country's mainland regions and is called Developing Quality in Preschool Education. If preschool education establishments decide that they want to use this methodology, the project may be generalised at a later stage.

A second, more structural intervention aims to work out guidelines for the development of literacy and numeracy competencies, to develop an initial approach to the experimental sciences for these age groups, and finally, to create guidelines for incorporating ICTs into preschool education. The idea is to promote a progressive link between preschool education and the first basic education cycle.

In the public education sector this connection is currently being favoured from an organisational point of view by integrating preschool education into groups of schools.

### 3.2.2 *modernising school curricula and assessment arrangements (inter alia to address learning outcomes and the attainment of key competences)*

The work on modernising school curricula is growing in intensity as of lately. Not only will the results of the external assessment of the secondary reform lead to readjustments designed to achieve greater efficacy at this level of education in the light of the future extension of compulsory education to the 12<sup>th</sup> grade, but in parallel to this the curricular review of the 2<sup>nd</sup> and 3<sup>rd</sup> basic education cycles is also underway.

Turning to changes that are intended to promote an improvement in school results, Portuguese Language is currently the object of a priority teacher training intervention under the National Plan for Portuguese Teaching, as is Mathematics under the Mathematics Plan. The latter entails a number of broader interventions in relation to teacher training, the certification of schoolbooks, and undertaking projects at schools with a view to improving the conditions and pedagogical strategies for teaching maths. In the Experimental Sciences field there is also currently a teacher training course designed to develop a more experimental approach to teaching science.

In the 1<sup>st</sup> basic education cycle the English teaching programme that is being generalised to cover all 3<sup>rd</sup> and 4<sup>th</sup> grade students seeks to gradually promote the teaching of English and thereby foster its incorporation into the curricula.

### 3.2.3 *addressing the specific learning / training needs of teachers (including pre-primary) to enable them to cope with their changing roles in the knowledge-based society*

In addition to the aspects we have already mentioned in 3.2.1 and 3.2.2 above, a new framework of reference is being defined for continuous teacher training. This new framework will not only define criteria for funding, but also for assessment, certification and accreditation, and some key areas of intervention. The existing training priorities in areas concerning specific didactic options – above all in relation to Mathematics, Portuguese Language and the Sciences – will be maintained.

### 3.2.4 *measures to reduce early school leaving, to increase rates of completion of upper secondary education, to reduce the proportion of low-achieving 15 year olds in literacy, and to increase the take-up of mathematics, science and technology subjects (EU benchmarks)*

Where the fight against early school leaving is concerned, and beyond the intervention initiated within the New Opportunity initiative, we would particularly note the following measures that have already been implemented and are designed to lead to an improvement in the attractiveness of schools and to help ensure that young people complete their secondary education (12<sup>th</sup> grade), complementing the actions promoted in the framework of the above initiative:

- The new rules on the recruitment of preschool, basic and secondary teachers. The new teacher placement format is creating greater stability:
  - for teachers and their families, who will now be able to settle in one place for three years and develop their work and organise their lives under improved conditions in terms of stability.
  - for schools, which will thus be able to count on the placement of their teachers for three years, thereby ensuring improved conditions with which to implement and continue with their educational and pedagogical plans, which will in turn make it possible to improve the conditions needed to combat early school leaving.
  - for students and their families, inasmuch as the new rules do a better job of ensuring that the academic year begins as scheduled, and that parents know in good time who their child's teacher is going to be in the following year – a factor that is essential to pedagogical continuity, which in turn strengthens the bonds between teachers and their students and is generally recognised as having positive effects on academic success.
- The alteration of the Statute governing the Teaching Career. This change is seen as a fundamental opportunity to strengthen the strategies for promoting success, preventing early school leaving and improving the quality of learning, in that it seeks to stimulate commitment on the part of teachers and direct both their work and the way in which schools are organised towards these goals.
- The 'One Day in Prison' project, the general objectives of which are to prevent delinquency and raise young people's awareness of the value of freedom. More specifically, the project is designed to provide an educational service to young people over the age of 12 and help prevent crime and reduce early school leaving.

## **3.3 Higher education**

### 3.3.1, 3.3.2 and 3.3.3

The current European framework offers a unique opportunity for all the Member States to mobilise in relation to their structural problems, having in view development reference values progressively closer to European benchmarks.

The chapter of the XVII Portuguese Government's Political Programme that is devoted to the qualification of the Portuguese population says that "...The key to the competitiveness of the Portuguese economy is called innovation. Innovation in processes, innovation in products and services, technological innovation, and innovation in organisation and management. By turning knowledge into value added, innovation makes it possible to accelerate the transition to a knowledge-based economy – a process that has been at the basis of a number of cases in which countries have experienced rapid economic growth. For this to happen it is necessary to combine an innovation policy with ambitious policies for the information society, science and technology, and for qualifying people."

In order to develop the competencies needed for the knowledge-based economy and society and to achieve economic competitiveness, factors that are vital to Europe's social cohesion and the full application of the renovated Lisbon Strategy Agenda, the process for the reform of higher education is under way, within the context of the present movement for the modernisation of universities and the non-university higher education sector. This reform includes a number of measures, mobilising higher education institutions, households and enterprises, and aim at:

- Ensuring the recognition of the qualification of Portuguese people within the European Higher Education Area, implementing the Bologna Process, a unique opportunity to increase enrolment in the higher education system, thereby improving the quality and relevance of the training it offers and fostering mobility and internationalisation;
- Promoting equal opportunities in access to higher education, improving frequency and conclusion levels in higher education courses, attracting new publics, within a logic of Lifelong Learning and promoting Social Academic Action;
- Ensuring the correct regulation of the higher education system, namely its organising principles, the autonomy of Universities and Polytechnic Institutes, the principles for the organisation and management of institutions and their assessment, including institutions and degrees, as well as ensuring the best conditions concerning teaching and research careers;
- The definition of objectives not only in terms of education/training levels, but also in terms of professional profiles that are in short supply on the labour market.
- Diversifying learning opportunities, as well as increasing opportunities for vocational conversion to new jobs;
- Improving the articulation between the institutions that promote lifelong learning, thereby fostering the sharing of resources and the promotion of combined education/training solutions.

Consequently, "(...) the education – basic, secondary and higher – policies and the vocational training and lifelong learning policies will thus be targeted at and focused on overcoming the Portuguese population's shortcomings in training and qualification – a move that is essential to the sustainability of the country's technological, scientific and innovation development plan" (from the Government's Political Programme).

By linking enterprises, teaching, training and research institutions and institutional and financial support bodies, partnerships for innovation and employment can become driving forces for the exploration of new areas of growth and job creation. Our higher education institutions have thus clearly mobilised behind a set of strategic priorities which the Government laid down in order to make it possible to achieve visible results in areas that are of manifest interest to the country's scientific and technological development, and to ensure the adoption of a culture of demanding standards with excellence as their point of reference.

Higher education establishments credit learning obtained in non-formal and informal contexts, or in a professional context and as a result of life experience as part of the system governing the access to this level of education by people above the age of 23. The same credits are awarded to students who apply for technological specialisation courses (non-higher level post-secondary level IV training), in a way that recognises their abilities and competencies.

The interest in the subject of the equity and efficiency of Europe's training and education systems has heightened certain aspects of this issue, which have been taken to heart as being essential to the modernisation of higher education in Portugal. The need to increase the investment in, and the support mechanisms for, the most disadvantaged students and the issue surrounding the absence of fairness and efficiency indicators have also been focused on, and the need to pay particular attention to these aspects of the overall question has been reaffirmed.

A vast process of reform designed to modernise the higher education system is currently underway in Portugal. Various issues have been addressed and are the object of new regulations: i) the guidelines for and regulation of the system; ii) the governance and legal status of institutions; iii) financing and efficiency; iv) access and equity; v) ensuring quality in higher education; and vi) opening institutions up to society and the economy. The reform is also intended to include strategies for attracting private funds, internationalising the system, the development of study programmes in English, and the offer of dual degrees with foreign partners, namely in advanced training. As part of this process we would especially note the measures that involve:

- Strengthening the legal conditions needed to ensure the qualification of Portuguese people within the European Higher Education Area, as an opportunity to increase the attractiveness and competitiveness of Portugal's higher education system, by improving the quality and relevance of the training it offers and fostering mobility and internationalisation.
- Promoting equal opportunities in access to higher education, by providing incentives for higher education institutions to take part in the lifelong learning process, thereby expanding that access to new audiences, for example by creating systems for validating non-formal and informal learning and paying special attention to vulnerable groups, especially students with special educational needs.

- Removing the obstacles to a return to higher education by those who have left it early.
- Increasing the number of new opportunities for level 4 vocational training, especially at polytechnics.
- Expanding and reorganising the Higher Education Social Academic Action (ASEES) system, by ensuring equity and creating a student loan system, thereby seeking to ensure that no student with ability and interest in the scientific and technological fields stops studying or limits his/her choice of learning institution for financial reasons.
- Creating instruments that ensure the accountability and efficiency of higher education institutions and the transparency of their management and accounting procedures, thereby improving quality.
- Ensuring that any higher education institution can be assessed on the basis of strategic plans and performance indicators, and that it fulfils the obligation to offer interdisciplinary programmes which involve elements of the economy and society; such assessments to entail consequences, particularly in terms of the grant of public funding.
- Improving the system that ensures the mobility of students, teachers, trainers and researchers, as a generalised means of improving the attractiveness of higher education in Portugal and Europe, by developing partnerships with foreign universities that lead to the joint award of the different degrees and diplomas.
- Implementing the debureaucratisation of the legal rules governing the recognition of foreign higher education degrees, which are currently a major obstacle to the circulation of graduates.
- Attracting highly qualified staff to the field of higher education, innovation and research, by adapting the existing legislation on the mechanisms for hosting foreigners – be they immigrants or not – with a high scientific and/or technical level, thereby ensuring that they enjoy the necessary conditions in terms of their entry into, and stay and settlement in, this country and the ability to bring their families to join them (undertaken in partnership with MNE, MEAI and MCTES).
- The Executive Law that creates the **Assessment and Accreditation Agency for Assuring the Quality of Higher Education**, the scope of which includes both public and private education, to which it applies identical criteria and procedures, which is in preparation.
- The draft **Law governing the Assessment of the Quality of Higher Education**, in preparation.
- The Executive Law which approves the rules governing the **Recognition of Foreign Academic Degrees**, in preparation, which will remove a major obstacle to the circulation of graduates, thereby accommodating all those who have obtained their academic degrees abroad and want to work in Portugal, without the existing bureaucratic barriers and delays.
- The new Regulations governing the Rules for **Changing, Transferring between and Returning to Courses**, which remove all the obstacles to the return of people who had interrupted their higher education, and alter the procedures for transferring between or changing courses. The new regulations apply a single set of rules to students from Portuguese and foreign establishments, widen the admission criteria, and simplify procedures.
- The new Regulations governing the **Technological Specialisation Courses** (CET). The new rules are designed to stimulate the creation of such courses, especially at polytechnics, increase the offer of level 4 vocational training, and expand the access to such training to include new audiences, thereby also opening up new paths to access to higher education.

In pursuit of this process proposals to change the legislation on the autonomy, management and regulation of higher education institutions, the statutes governing the careers of university and polytechnic teaching staff and scientific researchers, the statute governing private and cooperative higher education, and the new rules on taking higher education courses in the form of capitalisable units are all being drawn up at the moment.

The OECD and ENQA have both contributed to this process of the reform of higher education in Portugal by presenting extensive in-depth analytical reports on our higher education system and its accreditation and assessment system. They have also offered a number of recommendations in relation to the reform. In parallel, the practice of conducting external institutional assessments of higher education via the EUA has also been given a boost.

We have also been developing international partnerships for higher education and for science and technology that enhance the offer of high-level teaching programmes in integrated and multidisciplinary areas, increase the mobility of students, teachers and researchers, and stimulate our society's economic growth, by attracting activities that offer value added. A close working relationship between higher education institutions and enterprises is key to the development of a practice that is geared towards innovation and research, alongside that of the "learn to do" process. Examples of this process, which is embodied in the 'Commitment to Science' initiative, include the international cooperation programmes with MIT, Carnegie-Mellon University and Texas University at Austin (Programme MIT-Portugal, Programme CMU-Portugal and Programme UTAustin-Portugal, respectively) as well as with the Fraunhofer Society in Germany.

These programmes are making it possible to stimulate the development of national thematic research and post-graduate learning networks in Bioengineering, Energy, Transport and Logistics, Production (especially in the automobile, aerospace and mould sectors), Telecommunications and Information Networks, Software Engineering, Robotics and Critical Infrastructure Networks, Digital

Contents and Multimedia, Advanced Forms of Computing, and Mathematics. The most recent scientific and technological development arrangement of this kind is with Harvard University in the Medical Sciences field.

A whole range of new measures designed to foster excellence also includes: the launch of a programme to support invitations to guest university professors; a Post-Graduate Schools programme that links universities and research institutions in order to strengthen international partnerships; a Graduate Schools programme that associates polytechnics and other public and private institutions in such a way as to promote the polytechnics' internationalisation and stimulate their insertion into the socioeconomic structure; and a programme for inserting higher education students into research activities, particularly by means of research initiation grants for students, right from the beginning of their initial studies.

#### 3.3.4. *Measures to increase the number of mathematics, science and technology graduates (EU benchmarks)*

In 2003 the Commission presented a list of indicators and benchmarks based on average indicators for Europe that resulted from monitoring the progresses in pursuit of the Lisbon Strategy in the education and training sectors.

Where higher education was concerned, a need to train enough specialists in the Mathematics, Science and Technology fields to achieve an increase of at least 15% in the number of graduates and reduce the gender imbalance in this respect by 2010 was noted.

As part of the process of setting the number of places for the national competitive applications for admission to public higher education, given that in each teaching establishment such places are allocated by a given body that is competent to do so under the terms of the law and the institution's own articles of association, the Government has been recommending that such bodies consider increasing the number of places in Mathematics, the Sciences and Technological subjects. Where private and cooperative higher education is concerned, those private higher education establishments that hold the concession to a public asset are also recognising the need for an ongoing effort in these subjects and are therefore pursuing objectives designed to go some way towards meeting the need to qualify human resources in key areas if we are to fulfil the goals of the revamped Lisbon Strategy Agenda.

### **3.4 Vocational education and training and adult education:**

#### *A. The New Opportunities Initiative: Learning Pays*

The Government's policy agenda for qualifying human resources gives a central role to the vocational education and training and lifelong learning policies, which are targeted at overcoming the deficits in the training and qualification of the Portuguese population – a move that is itself essential to the sustainability of the country's technological, scientific and innovation development plan. Overcoming this deficit depends on providing an effective response to two strategic objectives:

- Ensure that the new generations are qualified to meet the demands of the European area, by increasing the efficiency of the education system, combating academic failure and dropping out, and entrenching an assessment culture.
- Promote a lifelong learning culture, to be based on a new education/training model which, by providing for a policy of inter-generational qualification, will reduce the shortfall in existing qualifications, increase fairness, and reduce the disparities in competencies in the labour market.

This framework includes the launch in late 2005 of the **New Opportunities Initiative**, as one – but not the only one – of the strategies designed to mobilise lifelong learning. This Initiative is a national plan that focuses on the academic and vocational qualification of both young people and adults. The importance of this bet is clear from the centrality attached to the qualification strategy (for both young people and adults) in both the National Employment Plan (PNE) and the Technological Plan.

#### *A.1 New qualifying opportunities for young people*

The challenge in this intervention axis is to make the 12<sup>th</sup> grade the minimum point of reference for education for all. The objective of betting on the diversification, strengthening and enhancement of the professionally qualifying paths that lead to dual certification is to place half the young people in secondary education on professionally qualifying courses by 2010, thereby reversing the trend in the number of young people who do not complete secondary education and improving the level of qualified insertion into the world of work. The goals of this axis are to:

- Ensure that dual-certifying 12<sup>th</sup> grade level courses cover more than **650,000 young people** by 2010. This goal, which represents an accumulated increase of **100,000 places**, will make it possible for the proportion of young people covered by professionalising paths to attain half of all the young people attending secondary education by 2010 (Table 3.1). This growth in the number of places on offer will be provided by the Ministry of Education and Ministry of Labour and Social Solidarity networks, as well as by the networks of private education and training operators.
- Ensure that by 2010 **every young person who is in danger of dropping out of the learning system** without completing his/her compulsory education is provided with the opportunity to be integrated into a professionalising path that will enable him/her to complete the 9<sup>th</sup> grade (Table 3.2).
- Extend Vocational Education to the secondary schools that form part of the public network of teaching establishments. By 2010 every public secondary school must include vocational courses as part of the learning opportunities it offers.

## *A.2 – New qualifying opportunities for adults*

The central objective of the New Opportunities Initiative's second axis of intervention is to improve the basic levels of qualification of those members of the adult population (over the age of 18) who have not completed the 9<sup>th</sup> grade or their secondary education. The creation of a system for effectively recovering the adult population's qualification levels requires the mobilisation, adaptation and strengthening of the various available instruments. Of particular importance are the recognition, validation and certification of acquired competencies (which should be the "doorway" to adult training), and the offer of professionalising training targeted at adults with little schooling.

The recognition of competencies acquired in non-formal and informal learning contexts over the course of a person's life is not only an important mechanism for increasing individual self-esteem and social justice, but also a fundamental resource for promoting the integration of adults into new formal learning processes. At the collective level the recognition of acquired competencies makes it possible to structure complementary training paths that are adjusted on a case-by-case basis. But more important still, it leads to the individual recognition of the capacity to learn, which is the main theme for the adoption of pro-active stances towards the search for new qualifications. The consolidation and expansion of the provisions for recognising and validating competencies is thus a resource that is essential to the country's development.

When it comes to the offer of professionalising education and training for adults with little schooling, we are betting on quickly expanding and publicising such opportunities, but also on creating conditions that will enable adults who are in work to attend them too. Without overlooking the importance of continuing to prioritise the response aimed at people who are in a disadvantaged situation in the labour market by enabling them to acquire competencies that promote their employability, it is also important to pay increasing attention to those who, although they are in work, are in a precarious situation due to inadequate qualification. So developing the capacity to construct individual learning trajectories that attach value to each person's acquisitions, promoting flexible models for organising training, and expanding training in the workplace are all priorities in this area of action. The goals of this axis are to:

- **Increase the offer of professionalising courses for adults – at the level of the 9<sup>th</sup> and 12<sup>th</sup> grades** – in such a way that **350,000 adults** are covered during the Initiative's lifetime. Attaining this target will imply widening the offer of Adult Education and Training Courses (EFAs) to secondary schools and the central units in groups of schools, with a strong emphasis on the offer of evening classes. It also means attracting the audience that traditionally looks for recurrent education to these paths (inasmuch as it is possible to provide a training response that is better suited to this audience's needs within this framework).
- **Programme the offer of dual-certification adult training at the secondary level** (Table 3.3).
- **Programme the offer of dual-certification adult training at the compulsory education level** (Table 3.4).
- **Reorganise the existing recurrent training model**, in such a way as to provide a training response based on the Adult Education and Training Course format, given that such Courses make it possible to construct more agile and flexible training paths, while nevertheless maintaining secondary level responses that are adapted to the needs of people who wish to pursue their studies.
- **Expand the Network of Competency Recognition, Validation and Certification Centres** – 'New Opportunities Centres' – by investing in the involvement of:
  - secondary schools and central units in groups of schools that form part of the public network.
  - Institute of Employment and Vocational Training (IEFP) training centres.
  - large enterprises that enter into protocols under which they declare their willingness to support the recognition and development of the competencies of those of their staff who possess little schooling.
  - various ministerial organisational structures, thereby making it easier for state employees who form part of those structures to gain access to the system.
- **Extend the reference framework of key competencies to the secondary level**. To be operationalised as part of the competency recognition, validation and certification processes, as well as in the Adult Education and Training Courses, thereby making a decisive contribution to the consolidation of this level of schooling as the minimum threshold for the qualification of the Portuguese population. The public presentation of the new 'Reference Framework of Key Competencies for Adult Education and Training – secondary level' took place in mid November of 2006.
- Ensure that by 2010 more than **650,000 people** obtain a certificate of competencies, with the target that by 2010 more than 75,000 diplomas granting scholastic qualifications equivalent to basic education and 125,000 diplomas granting academic qualifications equivalent to secondary education are being issued each year (Table 3.5).

## *B. Instruments that facilitate the implementation of the New Opportunities Initiative*

### *B.1 – Integrated System for Managing Offers of Dual-Certification Training (SIGO)*

This measure, which is crucial to the implementation of the New Opportunities Initiative, is intended as a response to two major objectives:

- i) sustain the decision-making in relation to the structuring of the offer of training, in such a way as to prevent dysfunctions at the level of coverage of the country and the various audiences, and to optimise the allocation of financial resources;
- ii) increase the understandability of the training opportunities on offer, by providing an integrated and exhaustive information instrument that supports the provision of academic and vocational guidance counselling to young people and is a useful tool for all the agents involved, from individual people to enterprises;
- iii) be an instrument for monitoring the New Opportunities Centres' work in terms of competency recognition and validation processes.

In this respect the publication in 2006 of the 'Secondary Education Access Guide' (*Guia de Acesso ao Ensino Secundário*) made it possible to apply the Guide in practice at the beginning of the 2006/2007 academic year. It contains organised information on all the opportunities for secondary education and training for both young people and adults.

#### *B.2- Campaign to mobilise society behind the value of learning*

In 2007 the Ministries of Education and Labour and Social Solidarity launched a generalised media campaign designed to mobilise society. Its objective is to attach greater value to education and training processes and stimulate the demand for professionalising training, thereby promoting lifelong learning paths.

This campaign is split into a number of different aspects. The first, which highlights the importance of qualifying the active population, focuses on the need for society to attach greater value to adults' investments in education and training, seen from a lifelong learning perspective. It places particular emphasis on enhancing the perceived value of the competency recognition, validation and certification process, as an opportunity to certify and strengthen learning that has taken place in a variety of non-formal and informal life contexts. The second aspect, which is centred on the younger population, calls for the continuity of secondary level studies, and in parallel seeks to attract students to qualifying learning opportunities that lead to dual certification. A third aspect, which will be launched in partnership with the National Association of Municipal Authorities, focuses on attaching added value to public schooling, particularly in terms of raising the profile of Mathematics and English and increasing the emphasis on school sports.

#### *B.3 – Training Plan for the New Opportunities Centres' technical/pedagogical teams*

Within the overall framework of the affirmation of the centrality of training as a pillar for attaining the network of New Opportunities Centres' targets and increasing the value attached to them by society, the National Agency for Qualification is currently implementing a Training Plan aimed at the Centres' technical/pedagogical teams.

The Training Plan includes actions that will be carried out in a phased manner in April, May, September and December 2007. They will develop/strengthen the competencies that all the Centres' technical/pedagogical teams need in order to operationalise the process of implementing the Reference Framework of Key Competencies at the secondary level. In April and May 2007 there will also be actions for all the New Opportunities Centres which began operating from 2006 onwards and which need to strengthen and consolidate their technical/pedagogical teams' competencies in relation to basic level competency recognition, validation and certification processes.

#### *B.4 - Model for supervising and monitoring the New Opportunities Centres*

As a complement to the training plan for the teams who carry out the basic and secondary level competency recognition and validation processes in the field, a model for supervising and monitoring the network of New Opportunities Centres is under development.

### C. Qualifying opportunities for young people and adults – evolution

#### *C.1 – Diversification of the offer of professionally qualifying paths for young people*

- 'Education and Training Courses' (CEF) (Table 3.6)

The increase in the number of classes in which this type of training is given matches an exponential rise in the number of students who have been asking for this professionally qualifying path. It should be noted that the increase in the number of both classes and students at the basic education level is truly significant (Table 3.7). It is important to continue to pursue the investment in the expansion of the 'Education and Training Courses' that has already begun, and to seek to positively discriminate in favour of the geographic areas that are hardest hit by academic failure and early school leaving.

**WORK PROGRAMME “EDUCATION AND TRAINING 2010”**

**NATIONAL PROGRESS REPORT – 2007**

**ANNEXES**

## Chapter II

Table 2.I

	Young People	Adults
2010 Goals	<ul style="list-style-type: none"> <li>Make the 12<sup>th</sup> grade the minimum reference training threshold for everyone</li> </ul>	<ul style="list-style-type: none"> <li>Qualify one million active people.</li> </ul>
	<ul style="list-style-type: none"> <li>Place 50% of the young people in secondary education on technological and vocational courses</li> </ul>	
Summary of Measures and Actions	<ul style="list-style-type: none"> <li>Extend the framework of reference for key competencies used in the RVCC system to the 12<sup>th</sup> grade</li> <li>Promote an improvement in the extent to which adult education and training matches both the active population's expectations and the conditions under which that population is able to take part in it</li> <li>Increase the amount of training conducted after work</li> <li>Negotiate with the social partners to create the conditions needed to make it viable for active employed people to participate in training paths</li> <li>Mobilise enterprises and business associations behind the training of their active staff</li> </ul>	

Table 2.II

	January	February	March	TOTAL	2007 Goal for each Centre
Registered	4,493	3,405	4,039	11,937	800
Recognition process	2,990	2,600	2,211	7,801	500
Certificates	438	674	1,188	2,300	300

Table 2.III

	January	February	March	TOTAL	2007 Goal for each Centre
Registered	317	193	419	929	300
Recognition process	199	162	195	556	200
Certificates	3	20	38	61	100

Table 2.IV - Access to Higher Education – Persons over the age of 23 (by 21<sup>st</sup> December 2006)

Type of education	No. of students registered	No. of students present at exams	No. of students obtaining passes	% of students present at all exams	% of students obtaining passes
<b>Public Higher Education</b>					
Universities	3,117	2,322	1,727	74.50%	74.40%
Polytechnics	6,488	5,647	4,437	87.00%	78.60%
<b>Total Public H. E.</b>	<b>9,605</b>	<b>7,969</b>	<b>6,164</b>	<b>83.00%</b>	<b>77.30%</b>
<b>Private Higher Education</b>					
Universities	7,252	6,936	6,130	95.60%	88.40%
Polytechnics	2,472	2,354	2,150	95.20%	91.30%
<b>Total Private H. E.</b>	<b>9,724</b>	<b>9,290</b>	<b>8,280</b>	<b>95.50%</b>	<b>89.10%</b>
<b>Total</b>	<b>19,329</b>	<b>17,259</b>	<b>14,444</b>	<b>89.30%</b>	<b>83.70%</b>

Source: GPEARI

**Table 2.V – Technologic Specialisation Courses (CET), in Higher Education Institutions, 2005/2006 and 2006/2007.**

					2005/2006		2006/2007	
	2005/06		2006/07		C/M/Inf-4	E/IT/C-5	C/M/Inf-4	E/IT/C-5
	H	HM	H	HM	HM	HM	HM	HM
<b>1<sup>st</sup> year, 1<sup>st</sup> time</b>	788	1053	923	1428	70	506	384	324
<b>Registered</b>	920	1259	1538	2253	96	593	549	596
<b>Graduated</b>	165	233			31	29		

Source: GPEARI, May 2007

C/M/Inf – 4 – Sciences, Maths and Computer Sciences

E/IT/C – 5 – Engineering, Manufacturing Industries and Construction

In 2005/2006, 71% of graduates are male; Main education and training areas are: 35% "Sciences, Maths and Computer Sciences"; 25% "Arts and Humanities" and 20% "Social Sciences, Commerce e Law"

For students registered in 2006/2007, main areas are "Engineering, Manufacturing Industries and Construction " - 26% and 595 students, followed by " Sciences, Maths and Computer Sciences " - 24% and 549 students;

In 2006/2007, polytechnic higher education institutions accepted 83% new registered students and universities 17%.

**Table 2.VI**

<b>EUROPASS</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
<b>No. of documents issued</b>	286	306	574
<b>Financial execution</b>	88,020.60 €	127,868.60 €	154,500.00 € *

\* Funds allocated. Of which 32,966.97 € had been executed by May

Source: National Agency for the Socrates and Leonardo da Vinci Community Programmes (ANPCSLV).

**Table 2.VII - Foreign degrees obtained by Portuguese citizens (2005-2006)**

		<b>Doctorate</b>	<b>Master's Degrees</b>	<b>Full Bachelor's Degrees</b>	<b>Short Bachelor's Degrees</b>	<b>TOTAL</b>
<b>Equivalences /Recognitions</b>		50	165	520	74	<b>809</b>
<b>Registered PhD's</b>	237					<b>237</b>

Source: NARIC – DGES.

The most sought after host countries are: The UK, followed by Spain and France. The most represented scientific areas are: Health, Architecture, Social Sciences and Economic and Enterprise Sciences.

Table 2.VIII - ERASMUS Mobility (2005-2006)

		Students			Teaching staff		
		M	F	Total	M	F	Total
		1.888	2.424	4.312	350	316	666
Countries	Spain			1.076			162
	Italy			771			58
	France			315			60
	Poland			269			47
Scientific subjects	Medical Sciences			609			106
	Engineering and Technology			603			*
	Business and Administration			595			66
	Social Sciences			560			*
	Languages and Philosophy						77
	Teacher education and training						* 62
Institutions	Univ.Porto			524			89
	Univ.Nova de Lisboa			409			
	Univ.Coimbra			401			61
	Univ.Técnica de Lisboa			339			
	Univ.Minho						49
	Univ.Trás-os-Montes e Alto Douro						32
Average duration of mobility / teaching missions				5 months			5 days
Age bracket				93% between 21 and 27 years old			39,3% between 40 and 49 years old

\* This value concerns 3 scientific subjects

Source: AN PALV

## Chapter III

**Table 3.1**

Formats (no. of places)	2005	2006	2007	2008	2009	2010
Technological Courses						
Vocational Courses						
Learning Courses						
Education and Training Courses		+ 5,000	+ 5,000	+ 10,000	+ 10,000	+ 5,000
Artistic Education Courses						
Technological Specialisation Courses						
Accumulated Annual Growth		+ 5,000	+ 10,000	+ 20,000	+ 30,000	+ 35,000
Annual Total	110,000	115,000	120,000	130,000	140,000	145,000

**Table 3.2**

Formats (no. of places)	2005	2006	2007	2008	2009	2010
Vocational Courses						
Learning Courses		+ 2,500	+ 2,500	+ 2,500	+ 2,500	+ 2,500
Education and Training Courses						
Accumulated Annual Growth		+ 2,500	+ 5,000	+ 7,500	+ 10,000	+ 12,500
Annual Total	15,000	17,500	20,000	22,500	25,000	27,500

**Table 3.3**

12 <sup>th</sup> grade	2005	2006	2007	2008	2009	2010
Adult Education and Training Courses	-	+ 19,000	+ 7,000	+ 14,000	+ 15,000	+ 10,000
Annual Total		19,000 (1)	26,000	40,000	55,000	65,000

**Table 3.4**

9 <sup>th</sup> grade	2005	2006	2007	2008	2009	2010
Adult Education and Training Courses		+9,250	+1,000	+13,750	+4,000	+6,000
Annual Total	8,000	17,250 (1)	18,250	32,000	36,000	42,000

(1) Includes admission to the EFA Courses of the flow that had previously been directed to Recurrent Education.

**Table 3.5**

	2000/05	2006	2007	2008	2009	2010
Basic Education	50,000	25,000	35,000	55,000	65,000	75,000
Secondary Education	-	15,000	35,000	70,000	100,000	125,000
Annual Total		40,000	70,000	125,000	165,000	200,000
Accumulated		90,000	160,000	285,000	450,000	650,000

**Table 3.6 - Number of Education and Training Course classes**

Academic year	No. of basic and secondary level classes
2006/2007	2,016
2005/2006	1,009

Source: ME/GIASE, School Census 2006/07; 2005/06

**Table 3.7 - No. of students taking Education and Training Courses**

Level of education and training	2006/2007			2005/2006			2004/2005		
	No.	Public	Private	No.	Public	Private	No.	Public	Private
Basic level	25,049	20,644	4,405	11,854	9,876	1,978	6,317	5,556	761
Secondary level	4,898	3,628	1,270	3,103	2,411	692	2,569	2,169	400
<b>Total</b>	<b>29,947</b>	<b>24,272</b>	<b>5,675</b>	<b>14,957</b>	<b>12,287</b>	<b>2,670</b>	<b>8,886</b>	<b>7,725</b>	<b>1,161</b>

Source: ME/GIASE, School Census 2006/07; 2005/06

ME/GIASE, Education Statistics 2004/05