



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

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If you wish to have more detailed information on education systems in Europe, we warmly recommend that you consult the EURYBASE database (<http://www.eurydice.org>) and the CEDEFOP monographs (<http://www.cedefop.gr>)

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INTRODUCTION

Europe is characterized by a very wide variety of education and training systems. In order that this diversity should be fully appreciated, EURYDICE, the information network on education in Europe and the European Centre for the Development of Vocational Training (CEDEFOP) jointly published *Education and Initial Training Systems in the European Union* for the first time in 1990. This book was updated in 1995 and then again in 1999/2000. Given the number of countries it now covers¹ and the amount of data available, this most recent update has been placed for consultation on the EURYDICE Network website (<http://www.eurydice.org>), instead of being distributed in printed paper form. In this way, it may be accessed by a maximum number of readers and updated on a more regular basis.

Descriptions relating to individual countries in turn include basic information on the administration and structure of their systems of education and initial vocational training at all levels, as well as brief accounts of their higher education and systems for initial and in-service teacher training, and of the status of teachers. EURYDICE and CEDEFOP have also used this latest update to add a chapter on adult education, which is an important topic in relation to the development of lifelong learning in Europe.

As in the previous edition, the information is structured with respect to a common table of contents to facilitate inter-country comparisons while ensuring that special features peculiar to each system are duly emphasized.

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

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

Initial vocational training is the subject of a chapter in its own right, as it is generally provided outside the ordinary education system, whether as part of schemes for apprenticeship, the special training of young people or vocational integration. This is followed by a chapter on higher education, in which a summary description is supplemented by sections on admission, fees, the academic year, courses, qualifications and assessment.

As indicated above, this latest updating also provides for the first time a general description of the way formal systems of general education and vocational training for adults are organized. The legislative framework and financing of this kind of education are also covered.

The situation regarding teachers is dealt with in a specific section for each level of education discussed. Also provided are statistics on the number of pupils, students, teachers and educational institutions and, where figures are available, on pupil or student/teacher ratios,

¹ **The European countries taking part in the Community Programme in Education, Socrates.**

attendance and attainment rates or, yet again, on the choice of branches of study or areas of specialization.

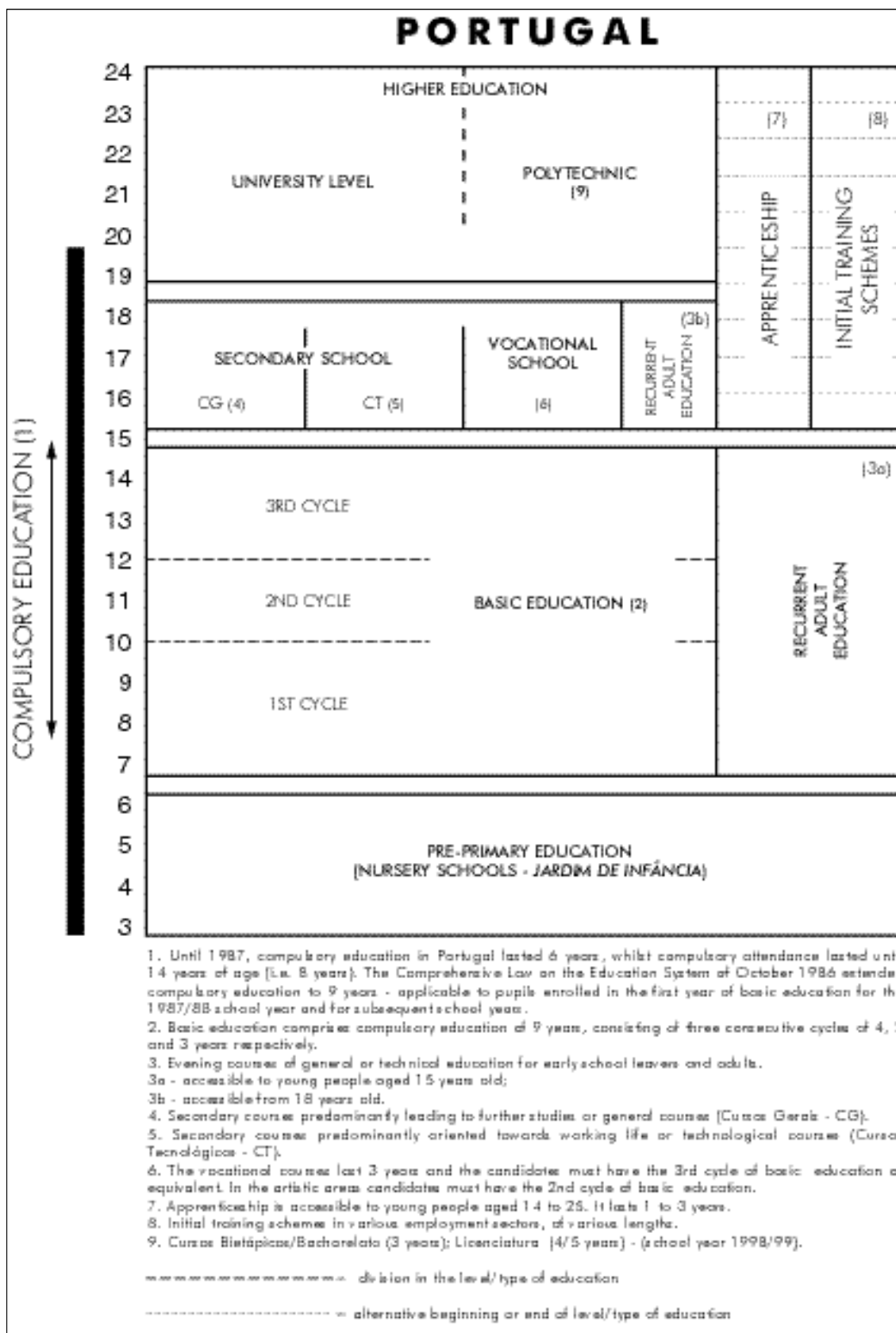
The description for each country is preceded by a diagram of its education system with explanatory notes. Here again, the way the diagrams are presented has, as far as possible, been standardized so that common – and differing – features of the various systems can be more easily identified and compared.

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

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March 2000



1. RESPONSIBILITIES AND ADMINISTRATION

1.1 Background

Portugal covers a total area of 91,851 square kilometres (Azores: 2,352 km²; Madeira: 795 km²) and has a resident population of 9.957 million (1997).

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

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

The islands of the Azores and Madeira are Autonomous Regions with Governments and Regional Legislative Assemblies with considerable powers. Throughout Portugal there are local authorities (*autarquias locais*), either the municipality or the *freguesia* (parish).

In 1997, Gross Domestic Product (GDP) rose by 3.6% (in real terms), private consumption by 2.9% and public consumption by 2.3% (in real terms).

External trade in goods and services rose by 8.1% for exports and 10.2% for imports. The unemployment rate among the population of working age was 6.8%.

In this year the level of schooling of the total population aged 15 and above was: Basic (9th year): 14.7%; Secondary: 10.9% and Higher Education: 7.8%.

1.2 Basis of the education system: principles-legislation

Principles

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

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

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

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

Legislative basis / Major reforms

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

a) *At the pre-primary level*, whilst the law published in July 1973 approving the reform of the educational system considers pre-primary education as an integral part of the system

(following it with two other legal acts defining its objectives and creating the official Nursery Schools), it was only in 1986, with the publication of the Comprehensive Law on the Educational System (LSBE), that pre-primary education was integrated into the general framework, with its generic objectives being defined in terms of the balanced training and development of children's potential, to be undertaken in close cooperation with the family environment.

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

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

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

In 1997 the Framework Law on Pre-primary Education was published, which further develops the principles already set down in the Comprehensive Law on the Education System. This framework law establishes the legal framework for this stage of basic education, and defines the general, pedagogical and organisational principles.

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

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

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

b) Compulsory and Post-Compulsory Schooling

With the publication of the Comprehensive Law on the Educational System (LBSE), compulsory education was extended to 9 years (Basic Education in 3 cycles) and post-compulsory schooling (Secondary Education) to a 3-year cycle aimed at pupils either continuing studies (general courses) or entering working life (technological courses).

In 1989 the new curriculum organisation for each cycle of basic education, as well as secondary education, were defined. The same year saw the introduction of the system of cultural, pedagogical and financial autonomy of second and third cycle of basic schools and of secondary education.

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

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

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

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

1997 saw the publication of legislation establishing a new system for providing educational support services in schools. In the same year, legislation was published under the joint responsibility of the Ministries of Education and of Qualification and Employment, allowing classes to be set up offering initial vocational education and training courses, in schools

teaching 3rd cycle classes. These classes are aimed primarily at pupils who have already received their certificate of basic education, but who have no immediate intention of continuing secondary education studies.

In 1997 legislation was also issued establishing the transitional system for 1997/1998 with respect to the reorganisation of the school network and school groupings with a view to the gradual decentralisation of educational administration.

In 1998 a new system of autonomy, administration and management of public institutions was approved. This includes groupings of nursery, basic and secondary schools. The new system is to be introduced gradually until the end of the 1999/2000 academic year.

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

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

The system of access to higher education, which has arisen out of the Comprehensive Law, has been the starting point of successive regulations relating both to its general aspects and to special systems. First of all the access system introduced in 1992 and revised in 1996 and 1997 establishes that access to public, private and cooperative higher education is based solely on the results obtained during secondary education and in the national secondary education examinations in the specific disciplines legally established for each type of course at each type of establishment. This was followed in 1998 by a legal act that defines the general framework of the new system of access and entry to public, private and cooperative higher education institutions, to come into effect in the 1999/2000 academic year.

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

changes introduced in 1996.

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

General trend/ strategies

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

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

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

Education in general is the sole responsibility of the Ministry of Education, apart from some education establishments that are either jointly supervised with, or fall under the administration of other Ministries.

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

The Ministry of Education (*Ministério da Educação* - ME) is responsible for defining national policy on education and sport. Its duties are to promote the development and modernisation of the education system, to strengthen the link between education, research,

science, technology and culture, to preserve and spread the Portuguese language and to promote the development of an integrated sports policy.

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

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

- Secretariat General (*Secretaria Geral* - SG);
- Department of Assessment and Current and Future Planning (*Departamento de Avaliação, Prospectiva e Planeamento* - DAPP);
- Financial Administration Office (*Gabinete de Gestão Financeira* GEF);
- Directorate General of Educational Administration (*Direcção Geral da Administração Educativa* - DGAE);
- Inspectorate General of Education (*Inspecção-Geral da Educação* - IGE);
- School Sports Coordinating Office (*Gabinete Coordenador do Desporto Escolar*);
- Office for European Affairs and International Relations (*Gabinete de Assuntos Europeus e Relações Internacionais* - GAERI);
- Department of Basic Education (DEB);
- Department of Secondary Education (DES);
- Directory General of Higher Education (DGESUP).

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

The Ministry of Education makes decisions with regard to the establishment and general organization of schools and school time and the employment of staff, and issues guidelines on the content of pre-primary education and the curricula for basic and secondary education. Together with the Ministry of Labour and Solidarity it approves curricula for the vocational schools.

The regional services are the five Regional Directorates of Education (*DRE - direcções regionais de educação*). These are decentralized services that carry out the tasks of the Ministry of Education at regional level with regard to the guidance, coordination and support of non-higher education establishments, the management of human, financial and material resources, school welfare systems, and supervision of physical education and school sport activities. In cooperation with the Department for Higher Education, they also coordinate and implement measures on admission to higher education.

Administration at the local level:

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

b) For pre-primary, basic and secondary education, a new system of autonomy, administration and management has been approved, to be introduced gradually until the end of the 1999/2000 academic year. The new system applies also to school groupings, a concept which includes the integrated basic schools, as well as situations where the regional director of education has verified that the system of autonomy, administration and management is suitable for the educational plan to be provided and the size of the establishment.

The transition to the new administration and management system can be carried out by the

members of the managing councils or executive directors in office at the time of coming into effect of the new legislation, or by an executive installation committee elected for this purpose.

This administrative and management body is responsible for drawing up the initial internal regulations and developing the mechanisms for electing the executive management and for installing the educational guidance bodies and structures which are provided for in the new system of autonomy, administration and management.

The internal regulations define the system under which the school or group of schools will operate, together with its administrative and management bodies and the educational guidance and educational support structures and services, as well as the rights and duties of the members of the school community. The internal regulations can be revised in the year following their approval, and any modifications deemed appropriate can be added. The new system of school autonomy, administration and management defines the following administration and management bodies

- The Assembly (*Assembleia*), the body responsible for defining the guidelines of the school activities, and in which the educational community participates and is represented.
- The Executive Management (*Direcção executiva*), consisting of an executive board or a head teacher, is a collegiate or single-person body, which has management responsibility for either a school or group of schools, as defined in the respective internal regulations.
- Pedagogical Council (*Conselho pedagógico*) – the body coordinating and providing the educational direction of the school, in the teaching and didactic areas.
- Administrative board (*Conselho administrativo*) – the body that discusses and takes decisions on administrative and financial matters.
- Once these bodies have been constituted, they have to be installed and activated in the next academic year. Responsibility for coordinating procedures with the administrative and management bodies of the educational establishments lies here with the regional directors of education.

At the level of Higher Public Education, universities and polytechnic institutes enjoy administrative, financial, academic and pedagogical autonomy.

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

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

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

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

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

The Ministry of Labour and Solidarity (*Ministério do Trabalho e da Solidariedade - MTS*) is responsible for defining and pursuing policies relating to employment, vocational training and social security. Its central structure, for the areas of employment and vocational training, incorporates the Directorate-General of Employment and Vocational Training (*Direcção-Geral do Emprego e Formação Profissional - DGEFP*), the Institute of Employment and Vocational Training (*Instituto do Emprego e Formação Profissional - IEFP*) and its Regional Directorates and the Institute for Innovation in Training (*Instituto para a Inovação na Formação - INOFOR*).

The DGEFP provides conceptual work and technical and legal support in the areas of employment and vocational training. The

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

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

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

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

The IEFP's Department of Vocational Training is responsible for curricular development, designing and preparing training programmes, defining training profiles, trainers' training, apprenticeship and the technical coordination of vocational training centres.

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

national vocational certification system and the Specialist Technical Committees (*Comissões Técnicas Especializadas*) for the individual sectors.

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

INOFOR's remit includes:

- Promoting research and designing the necessary tools for the understanding of future training skills and needs, and the direction in which these are trending;
- Defining the criteria for and assessing the quality of the training bodies, with a view to the balanced development of the training sector and the quality of the actions undertaken by it;
- Developing models, methodologies, programmes and instruments for training and training management, directed at specific target groups, and deriving from the priorities that have been established in terms of training policy and successful entry into working life.
- Promoting the development of research and research-action and giving greater impetus to new thinking and the exchange of experience on innovation in training, organisational models and human resources management.
- Cooperating in developing technical tools to support the technical management of the Community Support Framework/ESF programmes, in particular the criteria for the evaluation and selection of applicants and the system of technical-pedagogical supervision, with a view to improving the quality of the actions receiving support and the widespread dissemination of innovative solutions;
- Participating in the assessment, selection and supervision of projects and studies aimed at improving quality and promoting innovation in training and employment, in particular those developed under the Community Support Framework/ESF technical assistance programmes.
- Designing systems with which to assess skills already possessed or acquired in initial or continuing training, the certification (and equivalence) of these skills, and their interface with school

education and vocational training systems.

- Contributing to perfecting the methods and operations which are necessary for the full operation of the observatories that have been set up in the areas of employment, training and entry into working life.

1.4 Inspection/supervision/guidance

The General Inspectorate of Education (*Inspecção Geral da Educação - IGE*) is responsible for the educational and technical supervision and monitoring of all education establishments. With regard to public higher education, the Inspectorate is also responsible for verifying compliance with the legal provisions governing fees and support for students. In addition, the Inspectorate has the task of monitoring the financial and administrative efficiency of the education system as a whole.

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

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

The Inspectorate also has regional delegations, which report hierarchically and functionally to the Inspector General. These are decentralised services responsible for the pedagogical, administrative and financial supervision of the education system in their respective areas.

1.5 Financing

The financing of public education is basically

provided by Central Government, the Ministry of Education and others, although local authorities have some responsibility.

State education is essentially financed by the Ministry of Education, although the financing of some institutions is shared with other Ministries (e.g. the Military Academy and the Naval School, which are under the supervision of the Ministry of Defence and the Ministry of Education).

The Ministry of Education finances central and regional services through the allocation of funds, and finances private and cooperative education by means of budgetary transfers.

The regional administration of the autonomous regions of the Azores and Madeira finance educational services and establishments both out of their own resources and with state budgetary transfers.

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

Compulsory education is free as regards fees and other payments related to enrolment, school attendance and certificates. In certain cases, pupils are also entitled to free use of books, school material, transport, meals and accommodation. However, pupils and their families do make a significant financial contribution to education through the payment of enrolment and tuition fees and the purchase of books for both secondary and higher education (there are only token tuition fees in secondary education).

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

The exemption from enrolment fees applies to all pupils who are included in the indicative tables of those parts of the population that qualify for the various forms of non-generalised support. The same system applies to study

grants, the amount of which is also set by the level of study and the expenses to be covered.

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

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

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

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

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

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

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

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

The Fund's remit includes the appropriation of the budget lines intended for academic financial and social support as well as promoting, coordinating and supervising the system of

loans for granting autonomy to higher education students.

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

Training entities accredited by INOFOR have access to ESF budget lines.

1.6 Advisory and consultative bodies

The following consultative/advisory bodies exist:

- The National Council for Education (CNE), an independent higher advisory body of the Ministry, set up in 1992, which has autonomous administrative and financial powers. It is, responsible, both on its own initiative or when requested, for issuing opinions, reports and recommendations on all education issues, and particularly for ensuring the enforcement and development of the provisions set out in the Comprehensive Law on the Education System of 1986. It consists of approximately 60 members who represent the different organizations directly involved in educational, political and social sectors.
- The Council for Private and Cooperative Education (CCEPC), which advises the Minister of Education on measures to be taken to allow private and cooperative educational establishments to be included in the education system.
- The Council for Higher Education - Industry Cooperation (CESE), whose purpose is to develop cooperation between industry and centres of knowledge, namely universities and official research and development organisations, and to improve the technological base and the technical training of the labour force.
- The National Council for Social Action in Higher Education (CNASES), which is tasked with supervising or developing general welfare policy in higher educational institutions.
- National Council of Secondary Education Examination, chaired by a representative of the Ministry of Education and made up of representatives of the academic and pedagogical associations of those disciplines in which national secondary education examinations are held.

Finally, mention should be made of the Institute for Educational Innovation, which aims to promote scientific and technical research into curricular development and the organisational development of the education system, to contribute to increasing educational innovation, and to design and produce means of evaluating the education system and methods of assessing pupils, monitor their implementation and study their results; also of the System of Observatories (Observatory on the Entry into Employment and Careers of Higher Education Graduates (*Observatório sobre a Inserção e Percurso dos Diplomados no Ensino Superior*); the Permanent Laboratory for Higher Education (*Observatório Permanente do Ensino Secundário*), and the Observatory for Basic Education (*Observatório do Ensino Básico*). These are recently created information systems, intended to help manage the processes of change in the field of education.

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

- The Inter-Ministerial Commission for Employment (*Comissão Interministerial para o Emprego - CIME*), attached to the MTS, has been working on proposals to establish a global policy for employment and vocational training, whatever the level of training. Its job is to coordinate vocational training, more specifically that provided by public administration departments.
- the Social and Economic Council (*Conselho Económico e Social - CES*), which pronounces on the major options of economic and social policy.
- The Standing Committee for Social Consultation (*Comissão Permanente de Concertação Social - CPCS*), which signed the vocational training policy agreement.
- The Committee for Vocational Certification (*Comissão Permanente de Certificação - CPC*), coordinates the national vocational certification system.
- The Employment and Vocational Training Observatory (*Observatório do Emprego e Formação Profissional - OEFP*) with a consultative capacity on questions of educational policy and vocational training.

1.7 Private schools

Private and cooperative schools are set up and managed by private individuals acting individually or collectively.

Private and cooperative schools which provide collective instruction in keeping with the objectives of the national education system are eligible for the same benefits as public schools.

Private and cooperative non-higher education: A Decree-Law of 1980 establishes the Status of Private and Cooperative Education in the non-higher education area. This document states that the liberty of education is limited only by the public good, the general objectives of education and the agreements concluded between the state and the private educational establishments. Pupil and teacher mobility between the public, private and cooperative systems is secured.

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

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

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

Private and cooperative higher education: The present status of private and cooperative education, as approved in 1994, sets out the conditions for the creation of institutions and courses, the granting of the respective degrees, and defines the intervention of the state in terms of the quality of the teaching administered and the possibility for financial support. The legal act in question seeks to reconcile the independence and autonomy of the institutions with the necessary supervision and intervention by the state in order to guarantee scientific, cultural and pedagogical quality.

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

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

In 1995, the Ministry of Education developed a plan to expand the pre-primary education network in order to ensure greater coverage. It also defined the creation and maintenance of the system of financial support, as well as the criteria governing the establishment and operation of nursery schools. In 1996, the Ministry of Education, together with the Ministries of Labour, Solidarity and Social Security (MTSS), of Infrastructure, and of National Planning and Administration, launched the Pre-primary Education Expansion and Development Programme (*Programa de Expansão e Desenvolvimento da Educação Pré-Escolar*) with the objective of developing proposals for pedagogical intervention in curriculum development and teacher training, and of promoting and supervising the launch of innovation, training and research programmes. In 1997, following the principles already laid down in the Comprehensive Law on the Educational System, the Framework Law on Pre-primary Education (*Lei Quadro da Educação Pré-Escolar*) was published. This law defines this level of education as the first stage of basic education in the process of lifelong education. Under the terms of this Framework Law, pre-primary education can take various forms, which complement and inter-relate to each other, in particular peripatetic classes (*educação pré-escolar itinerante*) and community and child action. This law established the legal framework for this stage of basic education and defined the system of general and pedagogical principles, and the organisational principles. The new legal framework gives expression to the following

objectives: creating a national pre-primary education network, incorporating both a public and a private network; officialising families' right to participate in the development of educational plans and objectives, defining the instruments of institutional cooperation between the various government departments involved in the Pre-primary Education Expansion and Development Programme; defining the organisation of pre-primary educational institutions as well as the conditions of the financial support framework.

In accordance with the 1986 Comprehensive Law on the Education System and the Framework Law on Pre-primary Education, the overall objectives of pre-primary education are to develop the child's emotional stability, social, intellectual and motor skills and health habits and to seek to deal with the child's inadequacies, handicaps or precocious behaviour. Pre-primary education should complement the education provided by the family with which it must cooperate closely.

The new legal system for the development and expansion of pre-primary education establishes both a public network and a private network. The intention is that in the near future these should constitute a national network, with the objective of making pre-primary education universal. At both types of establishment, groups are mixed.

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

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

In schools under the Ministry of Education, priority access is given to children who will be attending compulsory education as from the following year and whose parents or legal guardians reside or work in the *freguesia* (parish) where the nursery school is located.

Whenever the number of places available is lower than the number of applicants, priority is given to older children; for this purpose their age is counted in years, months and days successively.

In private schools, priority is given to children whose families lack the necessary social and financial means.

2.1 Organisation

There exist both a state network and a private and cooperative network of nursery schools, both under the supervision of the Ministry of Education, and the administration and operation of which are coordinated and monitored by the Regional Directorates of Education.

The network of pre-primary institutions run by the MTSS through Regional Social Security Centres also includes state and private nursery schools. The latter fall under the auspices of various other bodies, such as the Private Social Solidarity Institutions (*Instituições Privadas de Solidariedade Social - IPPS*), cooperatives, autarchies and companies. Most of the state and private institutions under the supervision of the MTSS offer creches for children from birth to age three. The two types of services (nursery schools and creches) may operate in the same building or separately.

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

The legislation which has been in effect since 1997 defines pre-primary educational establishments as structures which provide services aimed at the educational development of small children and at providing support to families. They are required to offer a flexible operating timetable, in line with the needs of the community of which they are part. These establishments may operate separately or be attached to basic education schools.

The way groups are formed is a pedagogical question and depends on the methods and principles defined by the pedagogical council (*conselho pedagógico*) of the particular school.

Whenever nursery school size and attendance permit, the groups of children are organized in rooms according to their age. At nursery schools run by the Ministry of Education, no more than

25 children can be assigned to one teacher, and for homogeneous groups of three-year-olds, no more than 15. Teachers usually change groups each year.

Nursery schools under the Ministry of Education provide educational activities for five hours a day, divided into two periods, five days a week. The timetable may be increased by non-academic hours. The school holidays comprise 45 days in the summer and one week at Christmas and at Easter.

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

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

Attendance is free at nursery schools run by the Ministry of Education, while at those run by the MESS, parents share the costs, according to their family income (in public and private non-profit-making establishments).

2.2 Curriculum/ Assessment

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

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

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

Throughout the year, at the end of each phase, the teacher assesses whether the objectives defined for the phase have been accomplished; how far the children have developed and what skills they have acquired; and whether the plan of activities needs to be reformulated so as to

better ensure the emotional, social, psychomotor, perceptive, cognitive and moral development of the children. This assessment process should serve as a support for planning actions and activities to permit the educator to correct and adjust the educational process to the children's development.

Children move on to basic education at the beginning of the school year in which they have their sixth birthday. In the event of duly proven special educational needs, it may be recommended that a child stay on at nursery school beyond the legal age.

2.3 Teachers

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

In 1997 it was established that in future nursery teachers needed to complete their studies to master's (*licenciatura*) level (5 years of higher education), and that this training should include appropriate social, personal, cultural, scientific, technological and artistic training; educational sciences, and teaching practice. Certain training colleges also offer specialised training in a wide range contexts.

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

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

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

Teachers in state schools are civil servants.

2.4 Statistics

PRE-PRIMARY EDUCATION 1996/97

	No of schools	No of teachers	No of children
TOTAL	5709	7595	200490
Nursery Schools - Min. of Education	4385	7595	a) 124830
Schools run by Min. of Labour and Solidarity	1324	x	75660

(a) Includes 1087 children looked after by educational staff outside the schools

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

Basic education is compulsory for all children who have reached the age of six by 15 September of the first school year (1st year of the 1st cycle) and lasts 9 years. Admission to the following cycles (2nd and 3rd cycles) depends, fundamentally, on pupils' successfully completing the previous cycle.

Basic education, where part of compulsory state education, is free of charge. There are no entrance or enrolment or attendance fees, and no charge is made for report cards or school insurance, or for educational guidance and psychology, school welfare or school health.

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

The objectives of basic education, set out in the 1986 Comprehensive Law on the Education System, are to provide a general education for

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

conditions that will encourage the school and educational success of all pupils.

Continuing this approach, which tends to strengthen schools' role as a centre of educational activity, legislation was published in 1997 establishing a new system for the provision of educational support services in educational establishments.

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

Basic education is divided into three consecutive cycles:

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

Movement up through the three cycles relates to progress and each cycle complements and deepens the previous one, in a single global perspective.

In accordance with the general organisation of the educational system, as defined by the Comprehensive Law, a reorganisation of the school network was set in train from 1991 onwards and a new school buildings use introduced. Amendments were introduced by the legislation of 1997, which aims to develop the catchment area. This new type of school buildings use makes provision for installations

accommodating preferably more than one cycle. In this way we find the following types of schools: 1st cycle basic school (ages 6 to 10); 2nd and 3rd cycle basic school (ages 10 to 15); integrated basic school – 1st, 2nd and 3rd cycles (ages 6 to 15); integrated basic school plus nursery school (ages 3 to 15). In line with the provisions of the Comprehensive Law on the Education System, another form of relationship between the various cycles of basic and pre-primary education, that of educational regions for priority support, was introduced on an experimental basis as from 1996/97. These educational communities combine the three cycles of basic education with other educational areas, as well as psychological support, guidance, welfare and health services.

3.1 First cycle

Teaching at this level is provided by mixed primary schools (*escolas básicas 1^o. ciclo*) in the state, private and cooperative sectors. As mentioned above, children who are six years old by 15 September - and, as an exception, those reaching that age by 31 December - may begin this cycle. Priority is given to older children when filling school vacancies.

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

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

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

The timetable depends on the availability of space in school buildings. One of the two weekly 25-hour schemes (including break times) may be adopted, from Monday to Friday. In the normal scheme (always compulsory, except when there is a shortage of premises), morning courses usually start at 9.00 a.m. and finish at 12.00 a.m. In the afternoon, courses usually start at 2.00 p.m. and finish at 4.00 p.m.

In the two-shift scheme (adopted only for those classes that cannot be held under the normal scheme), courses start at 8.00 a.m. and finish at 1.00 p.m. in the morning session. In the afternoon session, courses start at 1.15 p.m. and finish at 6.15p.m.

The duration of the school year is fixed annually by the Ministry of Education. The 1997/98 school year lasted for 175 days, with classes from Monday to Friday. After the summer holidays (around 10 weeks), schools in Portugal reopen around the second fortnight of September. The school year generally ends around the end of June.

Curriculum

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

The curriculum is composed of the following compulsory subject areas:

- Expression and education: physical/motor, musical, dramatic and visual arts;
- Study of the environment;
- Portuguese language;
- Mathematics;
- Personal and social development or moral and religious education (Roman Catholic or other denominations);
- 'School area': the objective of this curriculum area is the acquisition of knowledge through multi-disciplinary activities and projects. This is achieved by establishing a connection between the school and the environment and pupils' personal and social development.

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

All of these subjects are included in the curriculum in each year of this cycle, but at varying levels.

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

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

four years.

3.2 Second cycle

The second cycle of basic education is provided in state or private education establishments (*Escolas Básicas 2º e 3º ciclos*, *Escolas Básicas 1º e 2º ciclos*, *Escolas básicas integradas*) and in basic distance education centres. The latter operate in geographically less accessible areas with low pupil populations.

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

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

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

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

The weekly timetable comprises 30 or 31 lessons of 50 minutes each. The school timetable is organised between Monday and Friday, or Saturday if the School Board so decides. The 1997/98 school year was the

same as in the 1st cycle for schools open from Monday to Friday. It lasted 220 days for schools open from Monday to Saturday. The annual total number of hours of teaching is, however, the same under the 5-day and 6-day week systems, as the teaching not given on Saturdays is distributed over the other days of the week.

Curriculum

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

The multidisciplinary areas are:

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

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

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

Textbooks are valid for a minimum of four years.

3.3 Third cycle

The 3rd cycle of basic education comprises three years of study, the final year constituting

the end of the nine years of compulsory basic education (for pupils who enrolled for their first year of schooling in the 1987/88 school year or after).

It is taught in integrated basic schools, and in 2nd and 3rd cycle basic schools.

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

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

This cycle has the following specific objectives:

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

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

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

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

Curriculum

The curriculum for the 3rd cycle includes both specific subjects and multidisciplinary subject areas.

The subjects are Portuguese language; foreign language (continuation of the foreign language started in the 2nd cycle); human and social sciences (history and geography); mathematics and natural sciences (physics, chemistry, biology); visual education; and physical education.

The multidisciplinary areas, allowing pupils a choice, are:

- Personal and social education, with a choice between personal and social development and moral and religious education (Roman Catholic or other denominations);
- Optional area, with a choice between a

second foreign language, music education and technological education.

There is also a 'school area', which in this cycle lasts for 95-110 hours a year, with a corresponding reduction in lesson hours devoted to the subjects involved in each project. In this cycle, the 'school area' includes civics education (participation in democratic institutions). Each pupil's assessment in this subject is taken into consideration for the award of the basic education certificate. This discipline is run independently by the schools.

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

Textbooks are valid for a minimum of three years.

3.4 Assessment/certification/ guidance

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

In addition to the school bodies, pupils and parents, the following services participate in the assessment process: psychological and guidance services; special education services; and other services at the request of the Pedagogical or School Council.

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

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

Formative assessment is descriptive and qualitative, and is based on comprehensive information gathered by teachers relating to the various areas of learning. It is intended to inform pupils, parents, their teachers and others concerned of the quality of the teaching and learning processes and the extent to which curriculum objectives have been achieved. It is also intended to help teachers in their choice of

methods and materials. The formal decision on formative assessment is taken at the end of each school term, at an ordinary meeting of the School Council in the 1st cycle or of the Class Council in the 2nd and 3rd cycles. During the school year formative assessment is the responsibility of the teacher in the 1st cycle and in the 2nd and 3rd cycles of the Class Council.

Summative assessment (*avaliação sumativa*) is the responsibility of all teachers and educational experts forming the School Council or Class Council. In carrying out their assessment they refer to general criteria defined by the School Council in the 1st cycle or by the Pedagogical Council in the other cycles. Summative Assessment is also undertaken at a meeting of the School Council in the 1st cycle or by the Class Council in the 2nd and 3rd cycles, enabling decisions to be taken on educational assistance and support. It is usually undertaken at the end of each school term and at the end of each cycle, but not before the end of the second year at school. At the end of each cycle, this assessment aims to compare the pupil's overall development with the overall objectives of the school cycle (the minimum national curriculum objectives laid down by the Minister of Education and the objectives set by each establishment).

The summative assessment made in the 1st cycle is descriptive and, in the 2nd and 3rd cycles, it is expressed by marks on a scale from 1 to 5, accompanied by a summary of the descriptive comments entered in the school records as part of the formative assessment process. For the purpose of moving from one class to the next, the summative assessment made at the end of each year is expressed by pass or fail. In the latter case, the pupil repeats. Pupils may repeat the entire year or follow a specific support plan incorporating the subjects or subject areas in which they have not achieved the minimum objectives.

At the end of the second term of any school year, the competent assessment bodies may make an extraordinary summative assessment of pupils not promoted that year. This provides for a recovery plan for the pupil through educational support measures. The summative assessment at the end of the 3rd cycle takes the form of global written examinations, which take as their reference point the 3rd cycle curriculum. The standardised assessment (*avaliação aferida*) does not affect pupil's progression within the school and is aimed at measuring the extent to which the minimum curriculum objectives defined at the national level have been fulfilled for each cycle of basic education.

A specialised assessment (*avaliação especializado*) is necessary during the course of a summative assessment when a pupil who has

already been kept back in any school year does not have the necessary capacity to continue. It is used at the request of the School Council (1st cycle) or the Class Council (2nd and 3rd cycles) by teachers and other education experts, after consultation with the pupil's parents, and should lead to a specific educational support plan to be implemented during the following school year.

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

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

Guidance is provided by the counselling and guidance services. These are specialist educational support units incorporated into the school network, which operate out of individual schools or cover school areas. In the 1st and 2nd cycles, guidance is predominantly psycho-pedagogical, while in the 3rd cycle it includes educational and vocational guidance.

3.5 Teachers

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

According to the 1986 Comprehensive Law on the Education System, the initial training of teachers of the 1st and 2nd cycles of basic education can be provided in non-university institutions of higher education (*escolas superiores de educação*) or in universities, whereas the training of 3rd cycle basic education and secondary education teachers takes place solely in universities. Whilst training for teachers of the different cycles of basic education varies, courses are organised in such a way that teachers of the 2nd and 3rd cycles also qualify to teach the preceding cycle.

Courses for 1st cycle teachers last three years

and lead to the *bacharelato* degree.

Courses for 2nd cycle teachers last four or five years - the first three years leading to the *bacharelato* degree, the last one or two leading to a specialized higher education diploma. 2nd cycle teachers may alternatively have a *licenciatura* degree obtained after 5 years.

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

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

All courses include academic and pedagogical training and teaching practice.

Some teachers in the 2nd and 3rd cycles of basic education and secondary education have been appointed without initial teacher training on the basis of purely academic *licenciatura* degrees. Those with less than 6 years' teaching experience are required to follow a 2-year course at a higher education institution; those with more than 6 years' experience can instead follow a 1-year course provided by the Open University.

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

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

3.6 Statistics

BASIC EDUCATION 1996/97

	No of schools (a)	No of teachers	No of pupils
TOTAL			1238199
Basic education,			
1st cycle	9870	35113	527261
2nd cycle	1555	b) 29969	292010
3rd cycle	1312	c)	417796
Level 2 courses in Vocational Schools			1132

- (a) Schools teaching more than one cycle are counted separately for each cycle
 b) Also provide 'second chance' education
 c) See under "Secondary Education" below

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

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

- Secondary school courses, part of the normal (regular) education system;
- Vocational school courses, an alternative to normal education;
- Art education courses.

4A General Secondary Schools

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

This type of education lasts for three years (age range: 15 to 18 years) and is organized in a single study cycle covering the 10th, 11th and 12th years of schooling, arranged in four branches of study: Scientific and Natural, Arts, Economic and Social Sciences, Humanities.

Pupils who have successfully completed basic education or the equivalent (9th year of schooling) have access to any secondary school

course. Access to the Specialist Art Schools (*Escolas Especializadas do Ensino Artístico*) in dance and music require prior practice and experience. Pupils normally enrol at a school in the area where they live.

In terms of general objectives, normal secondary education aims to consolidate and deepen the knowledge acquired in basic education and to prepare young people both for further studies and for employment.

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

- GENERAL COURSES (*CURSOS GERAIS - CG*): Secondary courses predominantly leading to further studies;
- TECHNOLOGY COURSES (*CURSOS TECNOLÓGICOS -CT*): Secondary courses predominantly oriented towards the world of work and employment.

Both types of course general, specific and technical/artistic education, the general education component being common to both types of courses. Pupils can change from one course type to another. Both types of courses must be provided in all post-compulsory secondary schools, although one of them may predominate.

4A.1 Organisation of the school

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

Each school offers permanent courses out of the body of courses proposed throughout the country. This choice may be dictated by local or regional socio-economic conditions and by the availability of qualified staff.

The size criteria for secondary schools are as follows:

Class size forms	Pupils	Average floor space per pupil	Average land space per pupil
16 to 30	384 to 720	8 - 8.5 m ² /pupil	30 m ² /pupil

Even if the main thrust of the development of the school network is to make a clear differentiation between basic and secondary schools, teaching establishments combining basic and secondary education may continue to function (whenever the use of already installed resources justifies this).

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

The number of pupils per class is determined as a function of the size of the classrooms, and ranges from 20 to 26 for an average-sized classroom (35 to 40 m²). While there is no compulsory requirement that pupils who use school transport be all in the same classes, their situation does have to be taken into account in organising timetables.

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

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

The length of the school year, which begins in the second fortnight of September and ends at the end of the second week of June, is defined by an Order published annually by the Ministry of Education. Within this calendar it is the

individual schools that set the dates for the assessment meetings, the publications of gradings, enrolment and the internal school examinations.

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

4A.2 Curriculum

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

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

Each of these main branches includes a general course primarily leading on to further studies (CG) and various technological courses (CT) representing major technological areas. The curriculum for the two types of courses comprises general education, specific education, technical education and the 'school area'.

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

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

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

The aim of technical education, particularly in the CT, is the acquisition of skills that will enable young people to access a wide range of vocational activities and sectors.

In the CG it lasts for six hours a week each year, divided into one or two technological or art subjects from which pupils are free to choose, depending only on what each school offers. In the CT, technical education covers a

group of subjects, closely linked with the specific education component, according to the qualification objectives of each course.

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

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

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

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

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

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

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

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

4A.3 Assessment/Certification/ Guidance

Assessment

The assessment system in secondary education takes three forms:

- Formative assessment: This assessment, which is carried out by the teachers, working together with the guidance and educational support bodies, is aimed at informing pupils, education managers, teachers and other parties involved about the development and the quality of the educational process. This form of assessment is descriptive and qualitative in form and contributes to establishing intermediate objectives which promote pupil's educational success, to the adopting of differentiated methodology, to promoting appropriate means of educational support; and to redirecting pupils with regard to their curriculum options.

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

- Summative assessment:

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

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

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

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

b) External assessment: This assessment, which is carried out by the Ministry of Education, is aimed at contributing to the homogeneity of

secondary education grading, enabling pupils to conclude this level of education with their respective grades.

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

The final grade in the disciplines which are examined nationally is the weighted average, rounded to the nearest whole number, of the grade obtained in the final *internal assessment* of the discipline in question and the grade obtained in the final examination.

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

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

- Standardised assessment :

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

The examinations are prepared by the Ministry of Education.

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

Transition/Certification

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

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

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

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

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

Guidance

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

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

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

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

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

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

The psychologists working in the guidance services hold career psychologist positions. These positions were created in 1997 by the Ministry of Education. In filling guidance counsellor posts, priority will be given to

teachers which have successfully passed the specialist guidance counsellor (*perito-orientador*) courses given by the Vocational Guidance Institute (*Instituto de Orientação Profissional*).

4B Vocational secondary school courses

Vocational schools, first set up in 1989, have been subject to a new system of creation, organisation and operation, since 1998. These schools offer a special form of education, aimed at introducing into the educational system a special path of studies which offers an alternative to regular secondary education.

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

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

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

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

Vocational Schools can also organise other educational and training courses and activities, such as vocational courses in the arts for students who have completed the second cycle; "second chance" (*ensino recorrente*) courses at basic or secondary level; after-work training courses; programmes to help young people with

basic and regular or vocational secondary school leaving certificates to enter the labour market; other vocational training activities which adapt the curricula of the vocational courses to the features and needs of the evolving socio-economic fabric.

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

4B.1 Organisation of the school

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

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

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

The Public Vocational Schools are created by joint order in council of the Ministries of Finance and Education, a legal system which also regulates their organisation and day-to-day operations. In the case of schools which have already been created, or which are to be created following the new legislation published in 1998, an installation committee (*comissão*

instaladora) is appointed. The task of this committee is to ensure that the school operates in a normal fashion and develops its own educational plan.

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

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

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

4B.2 Curriculum

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

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

The curricula include:

- a) Social and Cultural subjects, making up 25% of the total annual timetable, and common to all courses. The socio-cultural part is made up of: Portuguese, a foreign language and an Integration Area (*Area de Integração*);
- b) Scientific subjects, also representing 25% of the total annual timetable, and common to all courses in the same training area. This part consists of between 2 and 4 basic disciplines which are suited to the common base of the various ultimately differing ends. These disciplines should, on the one hand, correspond to secondary level teaching and, on the other, be relevant to the technological applications of the technical and vocational training specified for each course.
- c) Technical/Technological, Artistic and Practical subjects, which should not exceed 50% of the total timetable. This part of the training programme, which is established in the curriculum, can vary for the same course,

depending on the region in which the project is being carried out or in line with more specific project objectives. This part consists of 4 to 6 technical disciplines, with a predominantly theoretical part and a predominantly practical part, the latter in the form of a placement to be undertaken in a work context which is directly linked to practical activity in the respective vocational area, and in contact with the surrounding socio-economic fabric.

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

4B.3 Assessment and qualifications

Until the implementing regulations for the new 1998 system have been published, the system continues to be the one which has been in effect since 1992.

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

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

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

The course also includes, as an integral part of the assessment process, a vocational aptitude examination (*prova de aptidão profissional - PAP*), in the form of inter-disciplinary project. The pass grade in this examination is 10 or above.

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

final grade in the vocational aptitude examination.

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

Transition/Certification/Guidance

Until the implementing regulations for the new 1998 system have been published, the system is the one which has been in effect since 1992.

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

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

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

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

4C Art education courses

Various types of training in the field of art are provided at secondary schools, vocational schools and specialist art schools.

Secondary school courses

Secondary schools providing normal education offer three art courses.

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

Vocational school courses

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

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

Courses in specialist art schools

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

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

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

Teachers of Post-Compulsory Secondary Education

All teachers in secondary education are subject specialists.

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

The 1986 Comprehensive Law on the Education System determined that initial training of the 3^d cycle basic education and secondary school teachers would take place exclusively at the universities. With the amendment to the Comprehensive Law which was legally established in 1997, teachers of the 1st, 2nd and 3^d cycles of basic education now train in non-university institutions of higher education (*escolas superiores de educação*) or in university institutions of higher education. Secondary school teachers continue to train in university institutions.

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

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

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

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

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

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

Secondary education teachers teach 20 hours a week, where all teaching is done at this teaching level. Teachers are forbidden to teach more than five lessons in a row. This mandatory teaching portion for secondary teachers is reduced by two hours every five years up to a maximum reduction of eight hours, once teachers reach 40 years of age and 10 years of teaching, 45 years of age and 15 of teaching, 50 years of age and 20 of teaching, and 55 years of age and 21 of teaching. Teachers with 27 years' service receive the maximum reduction, independently of their age.

Statistics

SECONDARY EDUCATION 1996/97

	No of schools (a)	No of teachers	No of pupils
TOTAL			361679
General Courses,	543	110389	253559
Technical courses		(a)	81737
Level 3 courses in Vocational Schools		232	(b) 5298

(a) Institutions providing more than one type of course are counted separately each time.

(b) Teaching staff teach both 3rd cycle secondary pupils and 'second chance' education pupils

(c) Mainland Portugal only

5. INITIAL / VOCATIONAL TRAINING

5A Apprenticeship system

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

At the end of 1996, new legislation was introduced to reform the apprenticeship system. In it, apprenticeship is no longer conceived as an emergency measure for young people without alternative forms of education and training. Rather, it is an alternative form of training with its own identity, that is, a system of initial vocational training provided in an alternance structure, in the framework of vocational training required in the employment market, which gives young people who have left the regular educational system at an early age the means to acquire the qualifications they need in order to enter to labour market, and at the same time to further their education and obtain certification.

5A.1 Organisation

The apprenticeship system is aimed at young people aged between 16 and, preferably, 25. Those who have not completed their basic training first of all take level I orientation courses, except where the diagnostic assessment shows them to be capable of direct access to vocational qualification courses.

Thus, in accordance with the European Union qualification level to which it leads, the apprenticeship system is as follows:

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

The post-secondary technological specialisation or advanced technological qualification training courses are directed at young people having 12 years of schooling. Successful students receive level III professional qualifications and the Diploma of Technological Specialisation (*Diploma de Especialização Tecnológica*).

5A.2 Education/training establishments

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

5A.3 Financing

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

Trainees in the apprenticeship system are eligible for various forms of financial assistance: regular assistance from public funds, including the cost of food, transport, accommodation, children and dependent adults; training grants

for trainees who are unemployed and whose family aggregate has a *per capita* income equal to or less than 100% of the minimum monthly wage. Exceptional forms of support are also provided for trainees in specific situations or cases, who fall under specific measures, have qualification levels, or come from regions or sectors that are considered as having priority.

5A.4 Curriculum

Apprenticeship is provided in 26 training areas: agro-food; fisheries; automobile industry; footwear; ceramics and glass; civil construction; cork; electricity; electronics; energy; cooling and air-conditioning; casting; mining; graphics and paper-making; timber and furniture; metallurgy and metal engineering; jewellery; chemicals; textiles; banking and insurance; hotel, catering and tourism; computer industry; health and personal service; services; transport and quality management.

Apprenticeship lasts from one to three years, and comprises three parts:

- socio-cultural training, provided in vocational training centres, including Portuguese, the contemporary world and a foreign language, is aimed at the acquisition of skills, attitudes and knowledge for personal and professional development;
- scientific-technological training, also provided in vocational training centres. This varies according to the vocational sector and includes basic science subjects supporting in technological fields, and work simulation activities;
- practical training, under the guidance of the trainer or tutor. This may not exceed 50% of total training time, and the training should be integrated into the work context.

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

5A.5 Assessment/Qualifications/Guidance

Throughout the course there should be a formative and continuous assessment of trainees

in all aspects of the curriculum by means of tests and examinations in the three parts: general, technological and practical training.

Marks ranging from 0 to 20 are awarded for each aspect or part of the course. Ten points are considered the average minimum mark necessary to pass in each of the parts. However, a mark not lower than eight points is acceptable in one general or technological training part. Each year, the trainee is awarded final marks based on the arithmetical average of the marks obtained in the three parts of training. In order to move from one year to the next, trainees must receive pass marks in all three parts of training; and a year may be repeated in exceptional and duly justified cases.

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

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

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

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

Trainees passing their apprenticeship receive a *Certificado de Aptidão Profissional* (certificate of vocational aptitude), which is important for the purposes of issuing professional documents and may lead to a certificate recognised as equivalent to school education.

5A.6 Training of Trainers

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

5A.7 Statistics

In 1998, 6,085 trainees entered the apprenticeship system and 1,372 apprentices

completed their training. The drop-out rate is estimated at 9.0%.

Source: IEFP

5B Initial and Vocational Qualification Courses

Under an initiative of the Institute of Employment and Vocational Training (IEFP), under the tutelage of the Ministry of Labour and Solidarity, qualification itineraries based on credit units are offered by the Directly-Managed Vocational Training Centres (*Centros de Formação Profissional de Gestão Directa*). These are flexible training modules, lasting 1,200 hours (level II), aimed at the personal, vocational and social development of the trainees, enabling them to enter and leave the training paths at intermediate points.

They are directed at young people and adults who have at least completed the 2^d cycle of basic education, employed or unemployed, unqualified or with insufficient qualifications, to enable them to enter the labour market.

The non-qualified young persons follow complete qualification itineraries, that is the maximum length level II initial training courses. Non-qualified adults may undertake the training courses, accumulating credits according to the skills acquired, with the aim of completing, wherever possible, the level II qualification itineraries. Qualified adults may take made-to-measure training, in the form of credit units. For those in employment the aim is to update and improve their knowledge and skills, for those who are unemployed it is to obtain work.

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

The complete level II qualification itineraries have the following curriculum structure:

- socio-cultural (120 h.): development of personal and social skills, promotion of self-esteem, oral and written communication, foreign language, information technologies, citizenship for the future, health, environment and safety, and job-finding skills;

- scientific-technological (840 h.): mathematics and specific technologies;
- practical (240 h.): work context.

Trainees completing the qualification itinerary are entitled to a level II Vocational Qualification Certificate (*Certificado de Qualificação Profissional*). Trainees successfully completing a training course consisting of one credit unit receive a non-qualifying Vocational Training Certificate (*Certificado de Formação Profissional*).

In 1998, 4,501 trainees entered initial qualification courses and 3,993 persons completed them. The drop-out rate is estimated at 11.0%. Source: IEFP

5C Education and training courses

As part of the commitments undertaken in the Strategic Consultation Accord and in the Programme for Integrating Young People into Working Life, the Ministries of Education and of Labour and Solidarity, through the joint Official Communications (*Despachos*) nos. 123 of 16 June 1997 (D.R., 2nd series, 7 July 1997) and no. 897 of 6 November 1998 (D.R., 2nd series, 22 December 1998) created the education and initial vocational training courses.

The objective of these education and training courses is to allow students to complete their basic schooling, as well as obtain a certified level II vocational qualification. These courses are aimed at young people who would otherwise be in danger of not completing their obligatory schooling due to early abandonment or discontinuance. At the same time the idea is to allow young people who have completed their basic schooling to enjoy a year's vocational training leading to a level II professional qualification certificate.

These courses are intended for young people who are not covered by the 9-year compulsory schooling system and for employed and unemployed adults. For those trainees with 9 years of schooling who do not have the diploma from the 3^d cycle of basic schooling, the course lasts at least 1,020 hours. For trainees who have completed the 2^d cycle, the course lasts at least 1,500 hours. Training in the work context lasts between two and four months.

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

The organisation and provision of education

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

The curriculum is structured as follows:

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

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

weighted average of the marks obtained in each training part.

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

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

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

In the 1997/98 academic year, these courses were given by 38 schools. In the 1998/99 academic year, 100 schools are involved.

6. HIGHER EDUCATION

State higher education

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

University education aims to ensure a sound academic and cultural preparation, to provide technical training in vocational and cultural

activities, and to foster thinking skills, innovativeness and critical analysis.

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

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

university higher educational courses.

Private and cooperative higher education

Private and cooperative higher education is based on legal statutes which establish the conditions for setting up institutions and courses, recognise the respective academic degrees and define state supervision with regard to the quality of education provided and the possibility of financial support.

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

Education dependent on other Ministries

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

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

6.1 Admission requirements

State, private and cooperative higher education

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

Access to higher education establishments and courses is subject to *numerus clausus*. The number of places in state higher education

supervised by the Ministry of Education is established annually by the respective management bodies. In private and cooperative higher education, the number of places is established by the Minister of Education, based on the proposals of the higher education institutions concerned.

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

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

There is a centralized general admissions procedure. Applicants have to indicate, at national level through the Ministry of Education's Higher Education Access Unit (*Núcleo de Acesso ao Ensino Superior*), in decreasing order of preference, up to six higher education establishments/courses they would like to attend. The order of applicants for each course is determined at each education establishment by an application mark, calculated on the basis of the various tests and secondary education marks.

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

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

The rules for access to the *Universidade Católica Portuguesa* (Portuguese Catholic University) are an exception to the above system and are set out in legislation passed in 1990.

6.2 Fees/Financial support for students

State higher education

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

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

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

Private and cooperative higher education

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

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

6.3 Academic year

State, private and cooperative higher education

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

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

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

6.4 Courses

State higher education

Within the scope of state higher education, the universities offer courses in all fields of study (humanities, social and behavioural sciences, business and management training, law, natural and exact sciences, mathematics and computer science, engineering sciences and technology, medical sciences, agriculture, forestry and fisheries, architecture and town planning and physical education). These courses may last for four, five or six years and lead to *licenciado* degrees. Under the system of teaching

autonomy which applies in Portuguese universities, the assessment of knowledge and the testing of teaching experience is left up to each university.

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

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

Private and cooperative higher education

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

6.5 Assessment/Qualifications

State higher education

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

The following academic diplomas are granted in university higher education: *Bacharel* – a degree normally requiring three years of study, in certain cases one or two semesters less. It recognises that the holder has received an academic, technical and cultural education which allows him or her to exercise certain professional activities; *Licenciado* – a degree normally requiring four years of study, which in

special cases may be extended by between one and four semesters. This confirms that the student has received solid academic, technical and cultural training enabling him to deepen his knowledge, with a view to specialising in a particular area of know-how up to professional level. *Mestre* – the *mestre* degree confirms that the student has achieved a high level of knowledge in a scientific area and is capable of undertaking research; *Doutor* (Doctor) – the doctor's degree certifies a high level of culture and an aptitude for research in a particular area of knowledge.

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

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

Private and cooperative higher education

Private and cooperative university and polytechnic education is governed by the Statute on Private and Cooperative Higher Education which sets out how it is integrated in the state education system. Thus, the qualifications are equivalent to those of state higher education.

6.6 Teachers

State higher education

Teaching at higher educational institutions is open to persons having *doutor* and *mestre* degrees, *licenciados* who have passed tests of their teaching aptitude and scientific/academic capacity, and also individuals who are recognisably qualified. For professors at this level of education there is no formal vocational professional training, although requirements are established for filling each category.

Teaching staff are recruited by competition based on qualifications. The career categories for university teaching are: professor (*professor catedrático*), associate professor (*professor associado*), assistant professor (*professor auxiliar*), assistant (*assistente*) and temporary assistant (*assistente estagiário*). In addition to

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

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

Part-time teachers have a timetable which varies

between 8 and 22 hours a week.

Career professors in public higher education are civil servants.

Private and cooperative higher education

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

7. ADULT EDUCATION

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

7.1 Specific legislative framework

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

In 1976 the preamble of an order-in-council (*portaria*) defined the new concept of adult education as being "to encourage a process of learning specific to adults, which makes these – individually or in groups – the subjects of their own education and the creators of a genuine national culture".

Following legislation published in 1979, preparatory work began on the National Plan for Adult Literacy and Education (*Plano Nacional de Alfabetização e Educação de Adultos*), the primary objective being the elimination of illiteracy. This formed the

obligatory reference document, in the area of adult education, until the publication of the Comprehensive Law on the Educational System in 1986, which defined the organisational principles of the educational system, considering what it terms "recurrent adult education" (*ensino recorrente de adultos*) as a special form of school education, providing "second chance" schooling, with specific curricula and study methods, and conferring the same diplomas and certificates as the regular education system. The Comprehensive Law also made provision for continuing vocational training, considering "non-school education" (*educação extra-escolar*) as an integral part of the educational system, and defining its objectives and activities in the area of a wide range of both formal and non-formal initiatives. The general framework for the organisation and implementation of adult education in its two main areas of recurrent education and non-school education, is established by a decree of 1991. The curricula of the 1st and 2nd cycles of recurrent basic education were established at the end of the 1980s, whereas the present curriculum of the 3^d cycle of basic education, organised in a system of credit units, was defined later, in 1993.

The legal framework for vocational training is established by two decree-laws of 1991. Decree-law no. 401 of 16 October 1991 regulates vocational training both within the

educational system and within the labour market. Decree-law no. 405 of 16 October 1991 establishes the specific legal regime of vocational training within the labour market. The target groups are employed and unemployed persons of working age, including people looking for their first job, the objective being to enable people to carry out a skilled professional activity. Vocational training, both initial and continuing, is carried out by companies, training centres and other training or employment entities. At the end of 1997, a working party was set up by the Ministry of Education and the Ministry of Labour and Solidarity with the task of drawing up a strategy document aimed at revitalising adult education. Once published, this document led to the creation of the Adult Education and Training Development Programme (*Programa para o Desenvolvimento da Educação e Formação de Adultos*) and the setting up of a task force charged with putting it into action. This included strategic and technical structuring activities at every level that are pertinent to the adult education and training; setting up and running a network of local organisers of a wide range of adult education and training; setting up a formal system for validating knowledge and skills; launching national competitions for financing and supporting adult education and training initiatives which are innovative and relevant in this context, and also setting in train activities and processes aimed at creating a national adult education and training agency. In 1998 the Ministry of Education also launched a global external assessment of recurrent education aimed at giving a new direction to second chance education, more in line with the demands of modern society.

Adult Training has been regulated by sector of activity. It has also at times been included in Regional Development Programmes. In March 1998, in the context of the Health Sub-Programme, a Regulation was approved governing Individual Access to Training and the Availability of Individual Training Modules. Access to this training is open to workers in the health sector, both self-employed and those employed by third parties, at their personal initiative. Individual training modules are available to health system entities that are so entitled. Funding for qualifying and reconversion training, updating training, training to improve skills and professional specialisation, as well as training needed by people in order to progress in their careers and to ensure stability of employment, is available from the ESF.

More recently, a decree-in-office of April 1999 establishes the specific rules for the issuing of certificates of professional aptitude, as well as the conditions for the homologation of the respective vocational training courses for the

professions of machine tool operator and locksmith.

At the initiative of the Ministry of Labour and Solidarity, a work-training rotation measure was set up in February 1999 with the objective of stimulating access to continuing training for workers in small and medium-sized enterprises. This measure gives enterprises the possibility to offer continuing training to their workers and, at the same time allows unemployed persons registered with employment centres to obtain professional experience in the jobs of workers absent on training. The training activities should take place during working hours, and last no less than 1 month and no more than 12 months.

7.2 Administration

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

Within the Ministry of Education, it is the Department of Basic Education and the Department of Secondary Education that promote, coordinate and support, in a structured fashion, recurrent and non-school education and cultural activities in the area of lifelong education. The various adult education activities are carried out on site by the Regional Educational Directorates. It falls to the team of Educational Extension Advisors (*Orientadores de Extensão Educativa*), which are part of the Education Area Coordination Bodies (*Coordenações de Área Educativa*), to provide or supervise adult education activities. Each municipality (*Conselho*) also has its own Municipal Coordinator for adult education.

Adult training measures and programmes are organised and promoted by the Ministry of Labour and Solidarity via the Employment Centres and the Vocational Training Centres of the Institute of Employment and Vocational Training (*Instituto do Emprego e da Formação*). In the general framework of adult education the social partners are: a) the Inter-Ministerial Commission for Employment (*Comissão Interministerial para o Emprego - CIME*), with the task of coordinating vocational training and more specifically its implementation by the various departments of the public administration, b) the Economic and Social Council (*Conselho Económico e Social - CES*),

which decides on the main options of economic and social policy; c) the Standing Committee for Social Consultation (*Comissão Permanente de Concertação Social - CPCS*), which signed the vocational training policy accord; d) the National Education Council (*Conselho Nacional de Educação - CNE*), containing representatives of the social partners and functioning as an advisory body on educational questions, among them vocational training; e) the Standing Certification Committee (*Comissão Permanente de Certificação - CPC*), which looks after and coordinates the national system of professional certification. Consultative functions outside the areas of educational and vocational training policy are also undertaken by the Employment and Vocational Training Observatory (*Observatório do Emprego e Formação Profissional - OEFP*) and by the Supervisory Committee for the Accord on Strategy Consultation (*Acordo de Concertação Estratégica*), a pact signed at the end of 1996 by the Government and social partners – including the local authorities (*autarquias*), business companies, employers' and employees' associations, trade union and professional organisations, private social solidarity institutions and cultural associations at the local and regional levels.

7.3 Funding

The large majority of adult education activities undertaken within the ambit of the Ministry of Education are financed out of budget lines in the General State Budget.

In turn, the adult education activities undertaken in the context of the Educational Development Programme for Portugal (*Programa de Desenvolvimento Educativo para Portugal – PRODEP*) – that is, as part of the Adult Education Subprogramme – are financed in part out of Community funds, via the European Social Fund.

7.4 Organisation

The State promotes the carrying out of non-school and recurrent educational activities. The actual implementation may be entrusted to public and private entities of any kind, once their scientific and pedagogic quality is guaranteed and official recognition has been obtained.

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

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

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

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

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

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

B) Non-school education refers to educational and cultural activities organised outside the school system and carried out in the framework of a multiplicity of public or private initiatives, which can be structured in conjunction with recurrent education and school education. These activities are systematic in nature and are undertaken sequentially or by the alternate system,

The specific objectives of non-school education

are: a) to promote the development and updating of knowledge and skills in place of or in addition to school education; b) combating literal and functional illiteracy; c) promoting the creative and formative use of free time.

Access to non-school educational activities is open to individuals aged 15 or over at the start of the academic year in which their enrol.

Non-school education offers three types of courses: a) courses with no intention of obtaining school equivalences; b) courses with their own programmes, aimed at obtaining equivalence with units, subject areas or levels of recurrent education; c) courses which interlink with recurrent education, allowing students to obtain the certificates awarded by the latter.

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

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

7.5 Statistics

ADULT EDUCATION				
		No of students		
Second chance	Basic	66619		
Second chance	Basic 1st cycle	10861		
	Basic 2nd cycle	11177		
	Basic 3rd cycle	44581		
Secondary education		94376	G.C. 78130	T.C. 16246
Second chance	General courses	20845	20845	
Second chance	Technical courses	11339		11339
Additional 'liceu' course		17257	17961	
Addit. Technical courses		4299		4299
12th year teaching path		39224	39324	
Technical vocational courses (career break)		608		608

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

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