

Portugal

Population: 10.5 m. **Fertility rate:** 1.44. **GDP per capita:** USD 18 400. **Children under 6 years:** 666 762.

Female labour force participation: 67% of women (15-64) participated, with 14% in part-time (compared to 5.8% part-time for men – OECD, *Employment Outlook*, 2005); 79% of mothers with children under 6 were employed, accounting for 6% of part-time employment (OECD, *Society at a Glance*, 2005); 70.8% of mothers with children under 3 were also employed (OECD, *Babies and Bosses*, 2004).

Maternity and parental leave: 16 weeks at 100% of earnings or 20 weeks at 80%. Fathers can also benefit from this remunerated leave if the couple agrees.

Average duration of parental leave: Not available.

Compulsory school age: 6 years.

Social expenditure: 21.1% **Child poverty rate:** 15.6% after taxes and transfers (OECD average is 11.2%).

Funding of pre-primary educational services (ISCED Level 0): 0.44% of GDP and 6% of education budget for approximately 13% of educational enrolments.

Unit cost per child in early education: EUR 4 158 or USD 4 986 per child (public institutions only, *Education at a Glance*, 2005)

Funding to children under 3: Information not available.

Average costs to parents for a child in a crèche: 11% of average annual salary.

Legal entitlement to a free service: From age 3 years, children have a right to the educational component of the *jardim de infância* (kindergarten) programme. Places are not always available but the situation is improving.

Major service types and daily duration: Children 0-3 years: Centre-based crèches (11% coverage – 8-9 hours daily); crèche familiare (1.5% coverage). Children 3-6 years: *jardim de infância*, for 5 or 6 hours daily). Out-of-school time provision (OSP) for children 6-12 years: information on coverage is not available.

Rate and pattern of access to regulated services: Children 0-3 years: Almost 90% of children 0-3 years are cared for by their families or in informal care arrangements. Some 12% of children attend some form of regulated full-day crèche or family day care. Children 3-6 years: from age 3, about 60% of children attend *jardims de infância* rising to 90% by age 5-6 years (average coverage for children 3-6 years is 76.3%).

Designation and professional qualifications of key staff: Crèches are staffed by *educadores* (with a 4-year university or polytechnic training), nurses and social workers, all of whom have tertiary-level, professional qualifications. Kindergartens are staffed by *educadores de infância* with a 4-year university or polytechnic training. Secondary education

alone is obligatory only for teaching assistants, but training is now being introduced for education assistants.

Child-staff ratios: 10 or 12:2 in crèches; in *jardims* the ratio is 25:1 or 25:2 depending on whether a full-time assistant is being employed; in out-of-school time provision (OSP) the ratio is normally 15:1 or 20:2.

Maximum group size: In crèches, maximum group sizes practised are 10-12 children; in *jardims*, 25 children.

Auspices

The 1997 National Framework Law provides the definitions, major policy aims, orientations and implementation strategies for pre-school (kindergarten) education. The law perceives pre-school as the first stage of lifelong learning. Co-operation with families is emphasised. The national early childhood network in Portugal is both public and private, and overall policy responsibility for the network is shared by the Ministry of Education and the Ministry of Social Security and Labour (MSTT). Different partners work with the ministries, each having defined statutory roles. The Ministry of Education defines the normative aspects of pre-school education (hours of operation; organisation; pedagogical directions; evaluation and monitoring), and funds kindergartens (*jardims de infância*) for the age group 3-6 years. The Ministry of Social Security and Labour has charge of the regulation and funding of ECEC services focused on 0- to 3-year-olds, and of providing support to low-income families to enable children to attend kindergarten education, e.g. through the provision of free meals, subsidies to low-income families, etc.

A move towards decentralisation has taken place over recent years, and several policy and organisation matters are now being decided by municipalities, e.g. concerning training, posts and remuneration for assistant workers in *jardims* and the organisation of the out-of-school time provision in the public network with parents associations. The Regional Directorates of Education and the Regional Social Security Centres have the responsibility of enabling the implementation of national ECEC policies in their regions. To ensure co-ordination, a Bureau for the Expansion and Development of Pre-school Education was established in 1996 (working until 1998), bringing together the major ECEC stakeholders, including the National Association of Municipalities and the larger non-profit or voluntary providers, such as the Private Institutions of Social Solidarity (IPSS).

Context

Labour force rates: In 2004, the labour participation rate for women aged 15-64 was 67%, increasing from 59.6% in 1990. Of those, 14.0% worked part-time, compared to 5.8% of men working part-time (OECD, *Employment Outlook*, 2005). About 70% of mothers with a child or children under 6 years are employed, mostly full-time with about 10% in part-time work (OECD, *Babies and Bosses*, 2004).

Parental leave: In Portugal, a 16 weeks maternity period is allocated at 100% of earnings, or 20 weeks at 80% of earnings. Fathers can benefit from this remunerated leave if the couple agrees: 5 days simultaneous with mother or up to 120 days instead of mother at 100%. A parental leave period without remuneration can also be taken for a period from 3 months up to 4 years, until children are 6 years old. There is also a grandparent leave, amounting to 30 days if parent is less than 16 years at time of birth.

Access and provision

The operating hours and annual duration of services vary according to service type. Children from 3 months to 3 years can attend full-day crèches or family day care. Children from 3-6 years generally attend kindergarten or *jardims de infância*. The *jardims* open from 5-6 hours daily (depending on auspices). Children can also attend socio-educational activities when pre-school activities are over, if working parents need this extra time.

Rates of provision

0-3 years: Almost 90% of children are cared for by their families or within informal care arrangements; some 12% of children attend some form of crèche or family day care.

3-6 years: For the age group 3-6 years, enrolment rates relative to child age cohort in *jardims de infância* are: 3-4 years: 60% enrolled; 4-5 years: 75% and from 5-6 years: almost 90% are enrolled. Community centres and itinerant provision are also available on a small scale in areas where it is difficult to maintain a *jardim de infância*. Access to the “learning period” (the educative component) of the public *jardims de infância* is free, and since 2000/01, has become free also for children of 3, 4 and 5 years in the non-profit institutions of the private network (IPSS).

Children with diverse needs

Children with disabilities: In Portugal, there is growing inclusion of children with disabilities in all branches of education. The place of children with special needs within the pre-school system is protected in law. The policy goal is inclusion within regular kindergartens whenever possible, and in many settings, children with special educational needs are well integrated. However, referral rates for children 6 to 10 years of age are significantly higher than for the 0 to 6 age group, which suggests that many children are having their special needs identified too late.

Children from low-income families, ethnic and bilingual children: The child poverty level in Portugal is high and affects 15.6% of children after taxes and transfers (UNICEF, 2005). For children at-risk, several social integration programmes with an educational component have been sponsored by the High Commission for Ethnic Minorities, government ministries and municipalities. Children at risk are given priority entrance in some services – after children already enrolled and after children who will begin compulsory school in the following year. However, it was suggested by the OECD review team that identification and health intervention strategies for these children often fall as access is not appropriate.

Quality

Licensing and regulatory regimes: The State is responsible for the definition of general norms concerning pre-school education in relation to its organisational, pedagogical and technical components. It seeks to ensure their application through follow-up, evaluation and inspection. For children aged 0-3 years, the Ministry of Social Welfare (*Ministério da Segurança Social, da Família e da Criança*) is responsible for quality. In practice, however, there exists significant decentralisation to the regions with regard to pedagogical action and the management of the human, material and financial resources. For example, the geographically decentralised District Centres of Social Security are the units responsible for guaranteeing, in the respective area where they act, the management of social security schemes, the recognition of rights and fulfilment of duties in social security schemes and

the implementation of social measures. The *crèches* (0/3 years of age) and kindergartens or *jardims* (3/6 years) are under the control of these centres. The licensing process for family day care services involves formal registration and the implementation of annual health and safety checks. In *crèche*, kindergarten and accredited out-of-school care programmes, there is an additional requirement to follow a curriculum.

Funding: Expenditure on pre-primary educational institutions as a percentage of GDP is 0.44%. (OECD, *Education at a Glance*, 2005). Approximately 92% of this expenditure came from public sources and 7.7% from private sources. 6% of total expenditure on educational institutions is allocated to pre-primary, but this expenditure covers approximately 13% of total educational enrolments. OECD (*Education at a Glance*, 2005) provides a figure of EUR 4 158 as the unit cost per child in pre-primary education. Public provision is mainly indirect, serviced by accredited agencies (government independents) subsidised by government. The subsidies are supplied directly to the service providers. Private provision is mainly non-profit, as only non-profit providers can receive public funds.

Parental fees for 0- to 3-year-olds are predominately determined in the free market, but some public free provision is also available to certain groups. Parents accessing the public network may not have to pay any cost. In the private non-profit solidarity networks, parental fees should cover about 38% of costs; and in private services, parental contributions may account for 95% of costs. Average costs to parents for child care amounts to about 11% of an average aggregate family income. For 3- to 6-year-olds, the educational component of pre-school education is free, except in for-profit institutions. In these, the State can support low-income families through “development contracts” with the institutions. In addition, the State, through the Ministry of Social Security and Labour, heavily subsidises “family support” components of ECEC programmes, that is, meals, medical supervision, socio-cultural activities. Low-income families received enhanced reductions. Families also receive tax exemption for various educational expenses.

Staffing: All settings should have a pedagogical director, and each class a qualified early childhood teacher (*educador*). *Crèches* are staffed by *educadores*, nurses and social workers, all of whom have tertiary-level, professional qualifications. They are assisted by auxiliary workers who are not required to have a particular qualification, but training is now being required and put into place. The proportion of trained staff in *crèches* is not available. In the *jardims de infância*, the *educadores* or early childhood teachers are the lead staff. *Educadores* have the same pay conditions as primary school teachers, but their pay levels and conditions of work may be considerably reduced when they work in the social child care sector.

Training requirements: The minimum qualification required for social workers and early childhood nurses working in *crèches* is a four-year university degree. In the *jardims*, *educadores* are required to complete a four-year university degree as polyvalent educators. Normally, one of the early childhood teachers holds the post of pedagogical director.

Work conditions: There are few part-time staff in ECEC settings. The statutory working hours for trained staff and assistants are 30 hours per week. As noted above, *educadores* have the same pay conditions as primary school teachers, but their pay levels and conditions of work may be considerably reduced when they work in the social sector.

Professional development: On-going training for pre-school teachers and teachers is co-funded by the State and the European Social Fund. It is provided mainly in the Training Centres of the School Associations. Local municipal or inter-municipal training centres can

also be set up and managed by teachers representing various levels of education and teaching. Training courses can either be the result of one single initiative or of an association between several schools. *Educadores* must be provided with 56 hours annual of professional development courses, but they are not obliged to use their training quota. However, without a minimum of in-service training hours per year, they may not move up in their teaching career. Despite the fact that access to on-going training is mainly for infant teachers on the public network, those teaching on the private network may also attend. On-going training is also being planned and provided for education assistants in the form of courses or unit modules that can be accumulated.

Child-staff ratios: The maximum group size for *jardims* (kindergarten classes) is 25 with staff/child ratio being in general 25:1, and in some cases 25:2. The legislation requires one assistant worker for every two classrooms, with 25 children in each. When a *jardim* or pre-school in the public network has only one classroom, it is assigned one early childhood teacher and one assistant worker. This situation occurs more frequently in rural areas. In regulated family day care services, the maximum group size is 4, and the child-staff ratio 4:1. In the *crèches*, group sizes are 12 (solidarity network centres) or 10 (private centres) with ratios of 12:2 or 10:2. Accredited out-of-school care provision operates with maximum group size of 20 and child-staff ratios of 20:2. For socio-educational activities outside the “learning component”, requirements depend on the municipality. Generally, one social educator is present for each group of 15-25 children.

Curriculum and pedagogy: The Ministry of Education introduced *Curriculum Guidelines* in 1997 to improve pedagogical method and content. The guidelines (for kindergarten) indicate recognition of the importance of quality early childhood settings both for children’s early development and learning, and as a support to working parents. The guidelines allow for local expression in different parts of the country. As yet, it is unknown what impact this development has had on children’s daily experiences. Whether a play-based pedagogy has been retained is also unclear. Another development likely to influence the shape and direction of curriculum and pedagogy is the recent design of multi-media material to support pedagogy and help early childhood teachers. An assessment process has begun to evaluate the application of the guidelines for pre-school education, with the purpose of reformulation and bringing it up to date. Furthermore, an inquiry is being made among experts in pre-school education and curriculum development, about the pertinence of defining competences to be developed in pre-school education.

Monitoring, evaluation and research: Quality control in all parts of the system needs to be strengthened. Few inspectors specialised in ECEC are assigned to quality evaluation and support of the *jardims*. Although the State gives substantial grants to voluntary and charitable organisations, it does not always contractually require in return verifiable evidence of target achievement or outcome measures. In order to develop a culture of accountability, appraisal and inspection, the ministry is developing a system to monitor and supervise curriculum development in pre-school education. The monitoring system will cover kindergartens from both the public and private networks working in diverse situations. To accomplish this action partnerships have been established with the Regional Education Authorities and Institutions of Higher Education.

Parent and community involvement: The regime for the autonomy, administration and management of schools, approved by Decree-Law No. 115-A/98, includes the participation of parents in various bodies in schools and in the preparation and approval of the school’s

internal rules of procedure. Where *jardims* are concerned, participation in the activities of the pre-school is reinforced by the work of Parents Associations, legally established by Decree-Law No. 80/99. There are also Municipal Education Councils (“bodies for co-ordination and consultation that promote within the municipality the co-ordination of education policy, co-ordinating intervention within the education system of agents of education and the social partners involved”, D.L No. 7/2003) where parents associations and those responsible for education are represented. How these legal requirements work out in practice is not clear.

Policy developments in the areas identified by the OECD

Among the policy developments that have been signalled to the OECD since the review, the following are noteworthy.

Progress towards universal access, with particular attention to children under 3 and to children in need of special support. Within the Private Solidarity Network, the State has been increasingly co-funding the quality improvement of the services provided. It also shares with institutions and families, depending on their income, the costs incurred by both the educational and family support components. To meet educational component costs, the State pays the salaries of the early childhood educators and of auxiliary staff members as well as a proportion of costs of didactic and pedagogical materials. The State also subsidises a family support component in ECEC, e.g. meals and social educational activities. The increase in the numbers of children enjoying special supports is outlined in the table below:

1997/98	1998/99	1999/00	2000/01	2001/02	2002/03
4 434	6 009	6 108	6 943	7 174	7 696

Curriculum reform: No changes have been made to the Curriculum Guidelines for pre-school education (3/6 years), introduced in 1997, and educators continue to develop their practice using these guidelines. Currently, the articulation of subject areas as the basic structure of the ECEC curriculum is under study, alongside intentions to define pre-school education competences. Pilot work in the 2004/05 school year was undertaken in preparation for implementation of the new curriculum at national level in 2005/06. The Ministry of Education is planning a project to define the skills and learning required by pre-school children to develop their skills. This work is part of a wider curriculum reform ranging from pre-school to secondary education, which has emerged in response to concerns for better linkages and smoother transitions between ECEC programmes and the first cycle of basic education (6/10 years). The project includes also attention to inter-cultural understanding as a cultural value in Portuguese society and in current policy coordination work.

Quality inspections: The General Inspectorate of Education (*Inspecção-Geral de Educação – IGE*) conducted an assessment programme of about 600 pre-schools or *jardims* between 1999 and 2002, with the aim of encouraging improvement in these centres. The fields of observation covered the following teaching and process indicators: planning learning, curricular guidelines, educational aids, learning resources, assessment of learning and progress made, inter-personal relationships, co-operation among teachers; forms of

communication/information adopted, as well as the interaction of the centre with the surrounding community. Currently, the IGE has developed a project to assess the quality of teaching processes. This will cover pre-school education and the first cycle of basic education. The project will focus on small-scale units that have not been inspected for five years or more. Monitoring will focus on pedagogical achievement, the work of the educator and community integration.

Integration of jardins and play-schools into school clusters: The Ministry of Education is attempting to integrate play-schools and *jardims* into schools and promote better co-ordination between early childhood education (3/6 years) and basic education. There will be a focus on annual planning for the whole school, on common projects and on the process of transition from infant to primary school (6/10 years).

Improved educator and education assistant training: Under the Ministry of Education, the category of teaching assistant has been created and existing staff can now be promoted once they have attended adequate training lasting 80 hours (Decree-Law No. 184/2004). To begin the career of education assistant the minimum qualification is now the completion of Grade 12 of secondary education or equivalent, with a specific training course lasting for 180 hours. The Ministry of Social Welfare has also been investing in improving the qualifications of auxiliary staff and has decided to change the name of the profession to social and education assistant, social and education assistant for special education, direct action assistant or occupation assistant.

New foci for research: In the context of co-ordination between the Ministry of Education and the Colleges of Higher Education, a project has been developed with a view to promoting the use of new technologies among young children. In the context of the APROXIMAR project, research has been undertaken by the University of Évora into new technologies used in pre-school education (3/6 years old) and in the first cycle of basic education. This project began in the early 1990s in some pre-schools in Portugal (Alentejo) where isolation had become a challenge due to the exodus of the rural population to the towns. The project is now being extended to the majority of pre-schools and to first cycle primary schools.