EDUCATION POLICY OUTLOOK

PORTUGAL

OECD

BETTER POLICIES FOR BETTER LIVES

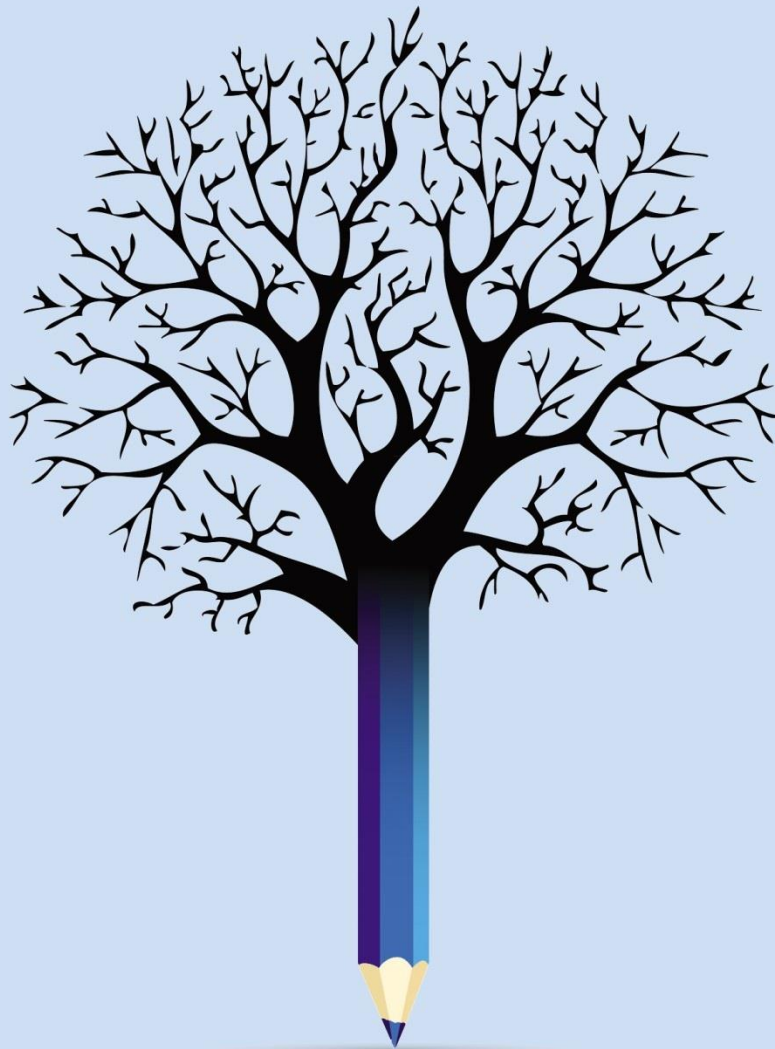June 2020

EDUCATION POLICY OUTLOOK

This **policy profile on education** in Portugal is part of the *Education Policy Outlook* series, which presents comparative analysis of education policies and reforms across OECD countries. Building on the OECD's substantial comparative and sectoral policy knowledge base, the series offers a comparative outlook on education policy. This country policy profile is an update of the first policy profile of Portugal (2014) and provides: analysis of the educational context, strengths, challenges and policies; analysis of international trends; and insight into policies and reforms on selected topics. It is an opportunity to take stock of progress and where the education system stands today from the perspective of the OECD through synthetic, evidence-based and comparable analysis.

In addition to country-specific profiles, the series also includes a recurring publication. The first volume, *Education Policy Outlook 2015: Making Reforms Happen*, was released in 2015. The second volume, *Education Policy Outlook 2018: Putting Student Learning at the Centre* was released in 2018. Its complement, *Education Policy Outlook 2019: Working Together to Help Students Reach their Potential* was released in autumn 2019. Designed **for policy makers, analysts and practitioners** who seek information and analysis of education policy taking into account the importance of national context, the country policy profiles offer constructive analysis of education policy in a comparative format. Each profile reviews the current context and situation of a country's education system and examines its challenges and policy responses, according to six policy levers that support improvement:

- Students: How to raise outcomes for all in terms of 1) equity and quality and 2) preparing students for the future;
- Institutions: How to raise quality through 3) school improvement and 4) evaluation and assessment;
- System: How the system is organised to deliver education policy in terms of 5) governance and 6) funding.

Some country policy profiles contain spotlight boxes on selected policy issues. They are meant to draw attention to specific policies that are promising or showing positive results and may be relevant for other countries.

Special thanks to the Government of Portugal and, in particular, the Portuguese Ministry of Education and the Portuguese Ministry of Science, Technology and Higher Education, for its active input during consultations and constructive feedback on this report. We also thank the European Commission for its valuable analytical and financial support for the update of this country policy profile.

Authors: This country policy profile was prepared by Christa Rawkins, Diana Toledo Figueroa and Rex Kaplan in the Policy Advice and Implementation Division, led by Paulo Santiago. Editorial support was provided by Stephen Flynn and Rachel Linden. This profile builds on the knowledge and expertise of many project teams across the OECD's Directorate for Education and Skills, to whom we are grateful. Antonio García Gómez contributed on behalf of the European Commission Directorate-General for Education and Culture.

Sources: Subject to country participation, this country policy profile draws on OECD indicators from the Programme for International Student Assessment (PISA), the Survey of Adult Skills (PIAAC), the Teaching and Learning International Survey (TALIS) and the annual publication Education at a Glance, and refers to country and thematic studies such as OECD work on early childhood education and care, teachers, school leadership, evaluation and assessment for improving school outcomes, equity and quality in education, governing complex education systems, school resources, vocational education and training, and tertiary education. This profile also draws on information in the OECD Education Policy Outlook National Survey for Comparative Policy Analysis completed in 2016 by the Government of Portugal, as well as information provided by the Ministry of Education and the Ministry of Science, Technology and Higher Education between 2018 and 2020 as part of the Education Policy Outlook's activities with countries.

Most of the figures quoted in the different sections refer to Annex B, which presents a table of the main indicators for the sources used throughout the country policy profile. Hyperlinks to the reference publications are included throughout the text for ease of reading, and also in the References and further reading section, which lists both OECD and non-OECD sources.

More information is available from the OECD Directorate for Education and Skills (www.oecd.org/edu) and its web pages on the Education Policy Outlook (www.oecd.org/edu/policyoutlook.htm).

In the context of the coronavirus (COVID-19) pandemic, some information is provided about initial responses.

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HIGHLIGHTS

Note: Most of the content in this profile was written before the COVID-19 outbreak. As such, this document offers insight into pre-existing conditions that may influence the system's responsiveness in the context of the crisis and help inform longer-term efforts to strengthen resilience. Spotlight 1 summarises Portugal's initial responses to the crisis. Its structure is based on work by the Education Policy Outlook in 2020 to support countries in these efforts.

Portugal's educational context

Students: In PISA 2018, Portugal[1] scored around the OECD average[2] in reading, mathematics and science, maintaining considerable improvements in student performance across cycles. Overall, socio-economic status had a similar impact on student performance in Portugal to the average impact across the OECD, but this can still lead to important educational disadvantages in the Portuguese context. Between 2008 and 2018, Portugal saw some of the largest increases in the educational attainment of younger adults among OECD countries. However, across the wider adult population (25-64 year-olds) attainment remains below the OECD average, with almost half of the population having either an upper-secondary qualification or more, compared to the OECD average of four out of five persons.

Institutions: Students in Portugal view several elements of their school experience favourably: they feel well-supported by their teachers and reported an above-average sense of belonging. Portuguese teachers and school leaders have some positive working conditions, but some elements of formal professional development could be strengthened, such as opportunities for induction, mentoring and participation in continuous professional learning. School evaluation, both internal and external, occurs systematically and has a growing focus on teaching and learning. Policy increasingly promotes a diverse use of evaluation instruments for student assessments, but high-stakes national examinations continue to create pressure for students, teachers and school leaders.

System: Efforts to increase the decision-making powers of both schools and municipalities have been ongoing. Although these devolved powers have tended to focus more on administrative and operational aspects as opposed to educational, more recently, national reforms have adopted locally focused implementation models which provide schools and municipalities with greater freedom to experiment and innovate in response to their contextual needs. Concurrently, there has been an ongoing process of rationalisation and consolidation within the public sector and the school network to increase efficiency and coherence.

Key policy issues

Reducing grade repetition and early school-leaving remain key policy areas. More specifically, Portugal has ongoing equity concerns, and students from socio-economically disadvantaged backgrounds are more likely to repeat grades, leave school early and perform below their more advantaged peers. Educational attainment levels remain low among the adult population and low adult skill levels pose potential future challenges. Engaging the adult population in education and training is therefore crucial. Despite recent improvements in their professionalisation, participation in ongoing professional development for school leaders remains unstructured, and teachers perceive a lack of incentives and employer support to engage in training. This is particularly challenging considering the growth in autonomy for schools and a broader need to continue strengthening school leadership as a distinct profession. Portugal has promoted the improvement focus of student assessment; this should now be embedded across all components of the evaluation and assessment framework. Securing the long-term sustainability of public funding for education is critical: this means targeting public spending where it can have greatest impact and finding solutions to reduce reliance on European funds.

Strengthening adaptability and resilience in the context of COVID-19 (see Spotlight 1)

Pre-existing resources in the education system appear to have facilitated areas of Portugal's immediate response. The regional and local support structures established to support national projects in curricular flexibility and autonomy and digital education were quickly mobilised to provide support to schools and teachers for the transition to distance learning. As Portugal works to balance short-term responsiveness with longer-term strategic aims and resilience, the crisis has brought specific challenges to be addressed. Portugal has made considerable progress in recent years in reducing grade repetition and early school-leaving rates. Maintaining and building on this progress may become more challenging as international evidence from the OECD (2020) suggests school closures can lead to increases in school drop-out and inhibit transitions between grades and phases. Strong targeted support for at-risk students, both during closure and once schools have reopened is therefore critical; adapting structures already in place such as the National Programme to Promote Educational Success and the Education Territories of Priority Intervention Programme to respond to the altered context may provide a useful starting point.

Spotlight 1. The Portuguese education system's initial response to the COVID-19 pandemic

On 11 March 2020, the World Health Organisation declared the COVID-19 outbreak a global pandemic. Education systems across the world felt the force of the crisis as confinement measures triggered widespread closures of education institutions. On 12 March, Portugal announced the closure of all education institutions from 16 March. Portugal began reopening higher education from 4 May and upper secondary from 18 May; basic education would continue at a distance to the end of the academic year. In light of the work of the *Education Policy Outlook* in 2020 in the context of this pandemic, this spotlight offers an insight into system readiness and immediate responses across five key areas:

1. **Ensuring continued access to learning and smooth educational pathways:** The Support Schools website was launched and constantly updated with tools, resources and guidance for online learning. An online course, Training for Digital Teaching, launched with around 750 schools and school clusters registered for the first session. To complement online learning, Portugal launched #EstudoEmCasa, eight hours of daily educational programming broadcast via a national television channel, YouTube and a mobile application. Thanks to public-private collaboration, teachers were also able to upload classes to YouTube and share resources via an online community, accessing training and technical support. In higher education, classes and assessment continued through institutional digital platforms, and the pre-existing COLIBRI and NAU - Sempre a Aprender platforms, which have been reinforced during closures. Portugal cancelled basic education assessments and standardised examinations for grade 9; upper-secondary examinations, which inform tertiary admissions, were maintained but postponed, and students would take fewer subjects. These students were prioritised when schools reopened. Tertiary institutions implemented distance examinations wherever necessary.

2. **Strengthening the internal world of the student:** The #SerJovemEmCasa campaign offered activities, workshops and information to keep young people stimulated at home. Youth associations contributed ideas and resources to the campaign. This complemented the #SerAtivoEmCasa campaign, publishing daily guidance, leaflets and videos across social media and official websites to promote physical activity as a way of maintaining the health of children and their families. The Ministry of Education (MoE) collaborated with the Order of Psychologists to develop a bank of wellbeing resources for young people, their families and teachers.

3. **Providing targeted support and interventions for vulnerable children and families:** Portugal continued to provide school meals to the most disadvantaged children despite school closures, and the number of children accessing these meals steadily increased. Portugal published Guidelines for the Support of Vulnerable Students (GSVS) with ten practical measures for schools to implement. The MoE also published specific guidelines for the Multidisciplinary Support Teams for Inclusive Education highlighting four key areas of support: 1) providing technical support to teachers and schools; 2) identifying and implementing methods for inclusive education; 3) supporting families to transition to online learning; and, 4) collaborating with other community services. Portugal announced that special education institutions would be among the first educational institutions to reopen on 18 May 2020.

4. **Harnessing wider support and engagement at local and central level:** Organised locally, designated education institutions remained open to care for children of essential workers. The MoE established a brigade of over 100 educators from the regional teams of the Autonomy and Curricular Flexibility project and other pre-existing national projects to support educators to adapt teaching and to collect and disseminate good practice. The GSVS recommended other forms of collaboration: mobilising local volunteers (e.g. university students, retired teachers and non-teaching school staff) to support high-need families; mobilising local partners (e.g. private sector) to provide digital equipment and Wi-Fi; and collaborating with the High Commissioner for Migration.

5. **Collecting, disseminating and improving the use of information about students:** The MoE established new communications tools to ensure timely and accessible guidance for educators: the E72 application was launched to provide answers to user questions within 72 hours, complemented by a new tool for school leaders to contact the MoE. Several platforms were put in place to promote the sharing of good practices.

| Selected indicators of system readiness (OECD)	Portugal	Average	Min	Max
Students' readiness (according to students' self-reports in PISA 2018)				
1 Index of self-efficacy	-0.01	0.01	-0.61	0.36
2 Percentage of students in disadvantaged schools with access to a computer at home that they can use for school work	88.5%	81.5%	23.5%	96.5%
Teachers' readiness (according to lower secondary teachers' self-reports in TALIS 2018)				
3 Percentage of teachers with a high level of need for professional development related to ICT skills for teaching	12.0%	17.7%	5.3%	39.0%
4 Percentage of teachers agreeing that most teachers in the school provide practical support to each other when applying new ideas	65.5%	77.9%	64.7%	86.5%

Note: The information presented in this spotlight covers key measures announced or introduced **before 11 May 2020**.

Key trends in performance and attainment

In PISA 2018, Portugal's performance in reading was similar to the OECD average, with a mean score of 492 points. The respective OECD score point average was 487. Across PISA cycles, Portugal has enjoyed steady and sustained improvement in reading, with an average 3-year increase of 4.3 points since 2000. However, the pace of this gain has slowed in recent years with, for example, no significant improvements in reading performance in the last three PISA cycles.

Figure 1. Trends and comparative performance of 15-year-olds in reading, PISA

Mean reading score, PISA 2018

Mean score in reading trend, 2009 to 2018 (PISA)
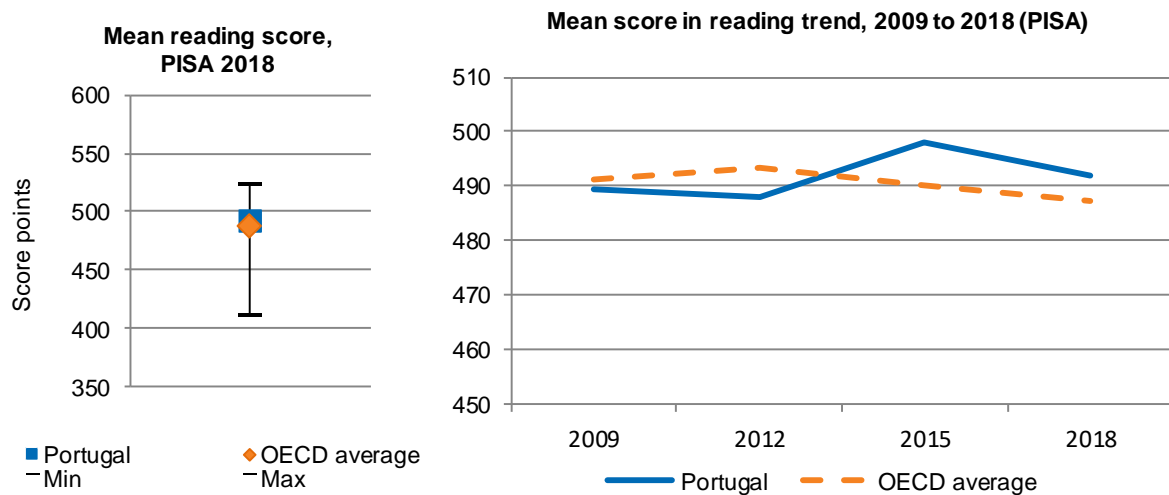
Note: "Min"/"Max" refer to OECD countries with the lowest/highest values.
Source: OECD (2019), *PISA 2018 Results (Volume I): What Students Know and Can Do*, PISA, OECD Publishing, Paris, https://doi.org/10.1787/5f07c754-en.

Since 2008, Portugal has experienced important increases in educational attainment among 25-34 year-olds: the share of those with either upper secondary, post-secondary non-tertiary or tertiary education as the maximum level of attainment has increased more than on average across the OECD. Nevertheless, at 71.5%, attainment of at least upper-secondary education in Portugal remained below the OECD average (85.4%) in 2018; tertiary attainment (35.1%) was also below average (44.3%). In particular, the share of men with at least upper-secondary attainment is relatively low in Portugal, at 64.4%, compared to an OECD male average of 83.8%. Women's tertiary attainment rates increased by 14.5 percentage points between 2008 and 2018 in Portugal, compared to a 10.7 percentage point increase for men.

Figure 2. Evolution of secondary and tertiary attainment among 25-34 year-olds, 2000-18
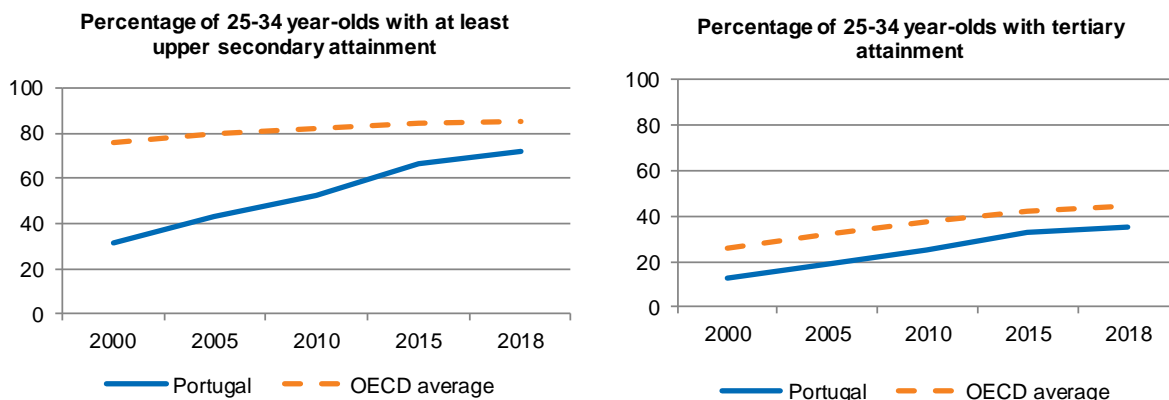
Percentage of 25-34 year-olds with at least upper secondary attainment

Percentage of 25-34 year-olds with tertiary attainment

Source: OECD (2019), *Education at a Glance 2019: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/f8d7880d-en.

Spotlight 2. Key policies, challenges and previous OECD recommendations for Portugal

Main policies from Portugal included in this country policy profile	Key challenges identified and recommendations previously provided by the OECD to Portugal
STUDENTS	

STUDENTS

- National Programme to Promote Educational Success (2016)
- Third Education Territories of Priority Intervention Programme (2012)
- Law for Inclusive Education (2018)
- Universal pre-primary education for 3-5 year-olds (2015)
- Special contest for tertiary admissions for vocational education and training (VET) and specialised artistic graduates (2020)
- National Skills Strategy (2015)
- Quality assurance framework for VET courses (2017)
- National Credit System (2013)
- National VET integrated strategy (2012-14)
- Youth Guarantee Strategy (2016-20)
- National System of Qualifications (2007)
- Qualifica Programme (2016)

Key challenges identified [2014, 2017, 2018, 2019]: The OECD identified a need for Portugal to increase educational attainment and tackle high early leaving and grade repetition rates at all levels for a more equitable system. VET was found to be less valued than general education, while the tertiary student population could be more diverse, with persisting enrolment inequities across generations. Despite improvement at the school level, adult skills, as measured by the OECD, were found to be low due to persistently low attainment among the adult population, Furthermore, participation rates in adult learning were highlighted as being low and, at times, inequitable. The OECD has also identified the challenge of skills mismatch in the labour force and some long-term unemployment.

Summary of previous OECD recommendations: The OECD recommended that Portugal systematically identify and target individualised support for students at risk of falling behind, as early as pre-primary level. The OECD also recommended facilitating transitions across educational tracks and improving collaboration between VET providers and employers to better align provision with labour needs. At tertiary level, institutional and funding support should be provided for disadvantaged students. In adult education, the OECD found that programmes should better target low-skilled adults and ensure flexibility and quality. Across the system, it was found that information about labour market prospects, returns to education and educational tracks should be improved. To improve employment prospects for doctoral candidates, the need for more professional and mixed PhDs was identified. Finally, the OECD suggested that developing digital skills across all levels would increase returns to education.

INSTITUTIONS

- Autonomy and Curricular Flexibility (2018)
- Pedagogical Innovation Pilot Project (2017)
- Lifelong training framework for teachers (2014)
- Clarification of the role of School Association Training Centres (2014/15)
- Comprehensive Model for External Student Assessments - Basic Education (2016)
- InfoESCOLAS Portal (2015)
- Escola 360° (2017)
- External School Evaluation (2006)
- Launch of third school evaluation cycle with new model (2019)

Key challenges identified [2012, 2017, 2018, 2019]: The OECD found that Portugal faces the challenge of ensuring that only effective programmes or initiatives are scaled up or systematised. There has been a low level of teacher participation identified in professional development and low engagement with international best practices. The OECD also observed that school leadership remained largely operational and collaboration could be limited. Appraisal mechanisms for teachers and leaders needed development. To achieve this, the need for an assessment framework putting student learning at the centre, which is fully integrated and perceived as a coherent whole, was identified, as was capacity building across the system. The OECD highlighted a need for a more systematised approach to evaluation and implementation.

Summary of previous OECD recommendations: The OECD recommended improving peer learning through professional networks, positioning schools as learning organisations, introducing teacher residencies to initial training and leveraging the Regional Training Centres

network to provide more incentives and opportunities for professional development. In Early childhood education and care (ECEC), the OECD recommended introducing formalised training and pathways into leadership. In VET, the need for systematic quality assurance and indicators to help align enrolment, course development and labour demand was also identified. Evaluation should be embedded as an ongoing part of the professionalism of system actors; this includes strengthening appraisal, observation and school self-evaluation. The OECD also found that the system's learning capacity could be improved through transparent and widely shared indicators, data access, a culture of planning and evaluation, and strategic capacity building.

SYSTEM

- Students' Profile at the End of Compulsory Schooling (2017)
- Essential Learnings for all disciplines from basic education to upper secondary education
- Curriculum Guidelines for Pre-School Education (2016)
- National Digital Competences Initiative 2030 (2017)
- National Education Strategy for Citizenship (2017)
- Co-ordinating Council for Higher Education (2017)
- Programme for the Modernisation and Valorisation of the Polytechnic Sector (2016)
- Profile of Students at the End of Compulsory Schooling (2017)
- Project for Autonomy and Curricular Flexibility (2017)
- Autonomy and Curricular Flexibility, (Decree-Law 55/2018)
- Portugal's Schools' Participatory Budget (2016)
- Changes to the system of study grants for tertiary students (2017)
- Consolidation of the school network (from 2004)
- The Institute for Financial Management of Education Finance (2015)

Key challenges identified [2012, 2017, 2018, 2019]: At ECEC level, responsibilities are split and the OECD found that the system needs better-defined goals and content, as well as improved communication. It also found that the school system remained fairly centralised, with little autonomy at local or institutional level, particularly in teacher allocation. The current teacher assignment model was found to create inequities and inefficiencies, exacerbated by the ageing workforce. In VET, although all pathways and programmes follow a common framework (*catálogo nacional de qualificações*) ruled by a single public agency (ANQEP), their provision and management are carried out by different institutions, creating a risk of overlap. At tertiary level, the strategic policy framework was found to be fragmented and crowded, with horizontal co-ordination across the government lacking coherence. The OECD considered that funding needs to be better aligned with priorities.

Summary of previous OECD recommendations: The OECD recommended setting and aligning clear principles and curriculum goals for the Early childhood education and care (ECEC) age range with learning targets at different ages. To improve implementation, the OECD advised that different parties should be involved in design processes and receive practical support. A greater role for schools or municipalities in teacher assignment and flexible retirement policies should be introduced. A publicly debated new school funding formula which considers equity was also proposed. VET could be consolidated into one dual system. Portugal could also develop a coherent national strategy to guide public higher education, research and innovation in the medium to long term with improved co-ordination across government. A better balance of top-down and bottom-up funding (including performance-based) was also suggested. In adult education, dedicated governance bodies and incentives for participation were proposed as well.

Note: The information on key challenges and recommendations contained in this spotlight draws from a desk-based compilation from previous OECD publications (subject to country participation). The spotlight is intended for exploratory purposes to promote policy dialogue and should not be considered an evaluation of the country's progress on these recommendations. Causality should not be inferred either: while some actions taken by a country could correspond to previous OECD recommendations, the OECD acknowledges the value of internal and other external dynamics to promote change in education systems.

Main sources: 2014, 2017, 2019: *The Economic Survey of Portugal*; 2012a: *OECD Reviews of Evaluation and Assessment: Portugal*; 2012b: *Quality Matters in Early Childhood Education and Care*: Portugal; 2018: *OECD Reviews of School Resources: Portugal*; 2019: *OECD Review of Higher Education, Research and Innovation: Portugal*.

Spotlight 3. The European Union perspective:

Portugal's education and training system and the Europe 2020 Strategy

In the European Union's growth and employment strategy, *Europe 2020*, education and training is recognised as a key policy area in contributing to Europe's economic growth and social inclusion. The European Union set a twofold target in education by 2020: reducing the rates of early school leaving below 10% and reaching at least 40% of 30-34 year-olds completing tertiary or equivalent education. Countries set their own related national targets. The Europe 2020 goals are monitored through the European Union's yearly assessment of the main economic and growth issues.

The *European Semester Country Report 2020* identified a number of key issues for Portugal in education and training:

- The Portuguese education system has experienced progress in the last decade, but there are still important challenges to address. The rate of early leavers from education and training decreased, tertiary education attainment grew and basic skills proficiency increased considerably. However, the high level of grade repetition and high drop-out rates persist, and a high percentage of adults have not completed their upper-secondary studies.

- Equality challenges in education persist. Students from deprived socio-economic backgrounds or who were born outside Portugal are more likely to repeat grades, leave school prematurely and display lower performance.

- Public investment in education is growing, but it is still far from the levels seen before the economic crisis. Large investments will be required in the near future to upgrade and renovate the existing school infrastructure.

- Participation in early childhood education and care is close to the EU average, although the availability of kindergarten places in several municipalities - in densely populated areas in particular - is below the national average.

- The main challenges facing the teaching profession in Portugal are high job instability, an ageing teaching workforce and a lack of certain skills. In 2017-18, the proportion of non-permanent teachers (on temporary contracts) ranged from 17% in primary education to 21% in secondary. As reported in TALIS 2018, fewer than 1% of teachers in ISCED 1-3 were aged below 30. Also, 22% of teachers in this survey reported a strong training need for teaching in a multicultural or multilingual setting, and 12% for the use of information and communication technologies (ICT) in teaching.

- Tertiary attainment is increasing, although many students leave tertiary studies without graduating. In 2017, only 30% of students who enter a bachelor programme graduate within three years (the expected duration of the programme for most fields). The government has taken a range of measures designed to ease the access to higher education and broaden enrolment.

- Educational performance differs between the autonomous regions of Madeira and the Azores and mainland Portugal. Historically, both archipelagos have lagged behind on several education indicators such as access to early childhood education, the percentage of students with some delay in their educational path and the rates of early leavers from education and training.

- Portugal continues to improve its mechanisms for quality assurance in vocational education and training (VET) and its analysis of skills needs.

- The Portuguese population has a high share of individuals with low educational attainment. Developing a coherent strategy for adult learning remains a major challenge. Participation in the flagship programme Qualifica, designed to tackle the low skills level of the adult population, continues to grow. However, detailed training and employability results are still lacking, which makes it hard to assess its effectiveness.

- The digital skills deficit remains a major obstacle for Portugal. Several initiatives for improving digital skills and competences have continued over the past year.

In May 2020, the Council of the European Union proposed the following country-specific recommendation to Portugal, with regard to education and training: "support the use of digital technologies to ensure equal access to quality education and training". Subject to its endorsement, this recommendation will be formally adopted in July 2020.

EQUITY AND QUALITY: SUSTAINED IMPROVEMENTS IN PERFORMANCE

Overall, Portugal has combined close-to-average performance in reading, mathematics and science with average **PISA equity indicators**. Portugal also had a similar share of low achievers (performing below Level 2) in all three subjects at 12.6%, compared to an OECD average of 13.5%, and top achievers (performing at Level 5 or above) in at least one subject (15.2%, compared to 15.7%). Indeed, Portugal is the only OECD country to see significant improvements in reading, mathematics and science throughout participation in PISA. However, while Portugal's positive trend in reading performance has been steady across cycles, in both mathematics and science performance, it is flattening. In PISA 2018, socio-economic status accounted for a similar amount of the variance in reading performance as on average across the OECD (12%), but important disadvantages still exist (see below). Gender gaps in reading outcomes are smaller than average but remain considerable, with girls outperforming boys by 24 points on average. Nevertheless, there was a substantial reduction of this gap by 14 score points since 2009. Students with an immigrant background in Portugal scored lower than their non-immigrant peers by 26 points on average, after accounting for students' and schools' socio-economic profile. This was similar to the OECD average.

ECEC policies can increase the equity of education systems. In Portugal, children typically begin pre-primary education (*Educação pré-escolar*) between ages 3 and 5. Prior to this, ECEC is provided either through a crèche, a child minder or a family crèche; care-only settings continue to exist at this age. Pre-primary education is optional but the government has aimed to guarantee the universal coverage of public or government-subsidised institutions for 3-5 year-olds by 2020. This is already a reality in most of the country except for some areas in Lisbon. At this age, provision integrates education and care services following a formal curriculum delivered by qualified teachers. Since 2016, updated Curriculum Guidelines for Pre-School Education have been in place for 3-5 year-olds (see "Governance"). Enrolment in ECEC grew considerably between 2005 and 2017 in Portugal, and rose above the OECD average for children under 3 years old and for 3-5 year-olds, although EU evidence suggests that growth fluctuated during that time period. In 2017, 86.4% of 3-year-olds were enrolled in ECEC and pre-primary education, compared to an OECD average of 79.3%.

According to OECD evidence, some **system-level policies** can favour equity, such as a longer period of compulsory education, delayed tracking, and limited academic sorting or grade repetition. Compulsory education in Portugal is longer than in most OECD countries, beginning at age 6 and ending at 18. Students are first tracked into different pathways at 15 years old (the end of basic education), one year earlier than the most common age across the OECD. According to principals' reports in PISA 2015, both between- and within-class ability grouping were much less common in Portugal than on average. School choice is enshrined in Portuguese legislation, with non-academic selection criteria for oversubscribed schools, including, since 2017, preference for disadvantaged students receiving School Social Assistance (ASE) (see "Funding"). However, the OECD (2018) reported challenges regarding social inclusiveness, particularly in the private sector. In PISA 2018, advantaged students had a higher isolation index in Portugal than on average across the OECD, suggesting they may informally sort into certain schools. Additional evidence from the Directorate-General for Education and Science Statistics (DGEEC, 2018) indicates that children receiving ASE and whose mothers have low attainment are often concentrated in particular schools, yet this may be due to regional inequalities as opposed to discriminatory practices; in PISA 2015, only 26% of Portuguese parents reported having a choice of more than one school in their area, compared to an average of 37%. Portugal's grade repetition rates were high in PISA 2015: 31% of 15-year-olds reported having repeated a grade in either primary or secondary education, nearly three times the OECD average. More recent DGEEC data (2020) indicate substantial, ongoing reductions, but the rate remains high in international comparison.

Portugal has improved educational outcomes over the last decade, however, **equity concerns for socio-economically disadvantaged students** remain. The odds of a disadvantaged student in Portugal being a low performer on the PISA 2018 reading assessment were nearly seven times higher than the odds for an advantaged student, compared to an average of five times across the OECD. Furthermore, 52% of disadvantaged students in PISA 2015 reported having repeated grades in Portugal, compared to 19% on average across the OECD and just 9% of advantaged Portuguese students. School closures during COVID-19, which the OECD (2020) has reported will be felt most keenly by disadvantaged students globally, risk exacerbating this ongoing challenge.

| Key strengths and challenges in equity and quality (pre-crisis analysis)	
Key strengths	**Key challenges**
- Across PISA cycles, Portugal has made significant progress in all reading, mathematics and science. - Portugal has increased enrolment in ECEC beyond the OECD average. - Portugal's extended duration of compulsory education may facilitate more equitable outcomes.	- The shares of high performers in both reading and science remain below OECD averages. - Disadvantaged students are more likely to repeat grades and have lower outcomes than their advantaged peers. - High social segregation between schools persists in Portugal.

Recent policies and practices

The National Programme to Promote Educational Success (*Programa Nacional de Promoção do Sucesso Escolar*, PNPSE, 2016) is a comprehensive strategy to combat school failure and grade repetition. PNPSE takes a preventive approach, promoting academic success in the first cycle of primary education via enhanced classroom interactions, early-intervention, teacher collaboration and comprehensive evaluation of student competences. There has been strong emphasis on building capacity for teachers and school leaders; PNPSE supports schools to develop improvement plans for their context and by 2018, 663 schools had done so. PNPSE also supports municipalities to develop local projects aligned with school actions; by 2018, 2 915 different actions had been defined locally, then disseminated nationally. However, the European Commission found that ensuring technical support, ongoing monitoring and overall coherence remain challenges.

The Law for Inclusive Education (*Decree-law No. 54/2018*) has emphasised the responsibility of schools to identify barriers to individual students' learning and develop diverse strategies to overcome them. It has also aimed to strengthen the active role of special education teachers within school teams. The law calls for a change in school culture to encourage more multilevel and multidisciplinary intervention, demonstrated commitment to inclusive practices and a move away from categorising students. Inclusive education is now mandatorily assessed through external and internal school evaluation cycles. To support implementation, meetings and training opportunities have been offered to school boards, teachers and other staff.

The third Education Territories of Priority Intervention Programme (*Programa dos Territórios Educativos de Intervenção Prioritária*, TEIP3, 2012) has adopted a territorial approach to reducing early school-leaving and improving outcomes among disadvantaged students. TEIP3 builds upon the two former editions (1996, 2006) to promote school autonomy to foster improved teaching and learning. It also widens the scope so that by 2016, TEIP covered around 16% of students in primary and secondary level. School clusters evaluate progress annually; their reports feed into a national evaluation. A research paper (2014) on the impact of TEIP, found improved student outcomes and attainment but persistent gaps between TEIP and non-TEIP schools. As of 2016, the PNPSE and TEIP combined covered almost 99% of schools. Recent international evidence from the OECD (2020) suggests that school closures implemented in response to the COVID-19 pandemic could exacerbate school drop-out rates; the intervention structures developed through both the TEIP and PNPSE programmes will therefore be particularly crucial as schools begin to reopen.

Portugal introduced universal free pre-primary education for 3-5 year-olds (2015), for full implementation by 2019. Over 300 new classrooms have been built and, by the end of 2018, 95% of municipalities had met their coverage needs. By 2015, 82% of 3-year-olds were enrolled in ECEC, 91% of 4-year-olds and 97% of 5-year-olds. By 2017, all of these participation rates were above both the respective OECD averages.

Figure 3. Selected equity and quality indicators for Portugal, PISA 2018
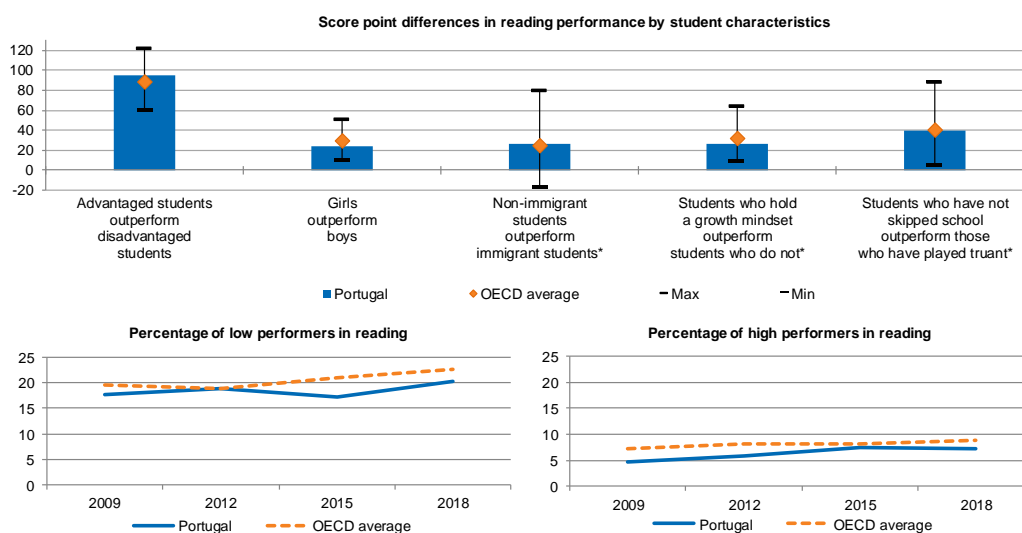
Note: "Min"/"Max" refer to OECD countries with the lowest/highest values; [*] Score point difference after accounting for students' socio-economic status and language spoken at home.
Sources: OECD (2019), *PISA 2018 Results (Volume I): What Students Know and Can Do*, PISA, OECD Publishing, Paris, https://doi.org/10.1787/5f07c754-en; OECD (2019), *PISA 2018 Results (Volume II): Where All Students Can Succeed*, PISA, OECD Publishing, Paris, https://doi.org/10.1787/b5fd1b8f-en; OECD (2020), *PISA 2018 Results (Volume III): What School Life Means for Students' Lives*, PISA, OECD Publishing, Paris, https://doi.org/10.1787/acd78851-en.

PREPARING STUDENTS FOR THE FUTURE: GROWING ATTAINMENT RATES

The capacity of a country to effectively develop **skills and labour market perspectives** can play an important role in the educational decisions of the population. Portugal has shown comparatively high financial returns to skill: the wage premium for tertiary education credentials relative to secondary education in 2017 was 69%, compared to an OECD average of 54%. Employment rates in 2018 remained above the OECD average for each level of educational attainment. However, this appears to be changing: among 25-34 year-olds, employment rates for those with less than upper-secondary attainment decreased between 2008 and 2018 compared to increases for their more highly-educated peers. Furthermore, among 20-24 year-olds specifically, the share of NEETs grew from 13.5% in 2008 to 16.8% in 2018. There were also notable differences according to immigrant status: 12.2% of 15-29 year-olds born in Portugal identified as NEETs in 2017, compared with 15% of foreign-born people arriving by the age of 15 and 29% of those arriving at 16 years old or more.

Levels of **upper-secondary** attainment in Portugal have increased among younger adults in recent years: between 2008 and 2018, the share of 25-34 year-olds not reaching this level of education fell by 25 percentage points, which was the largest decrease in the OECD. According to Eurostat, Portugal also had one of the biggest decreases in the share of early school-leavers from education and training; among 18-24 year-olds the share was 10.6% in 2019, compared to 34.9% in 2008, now standing slightly above the EU average of 10.3%. Moreover, at 71.5%, Portugal was still among the countries with the lowest shares of young adults with at least upper-secondary attainment in the OECD, where the average is 85.4%. Evidence from PISA 2018 suggests that socio-economic background and gender influence education and career expectations to a relatively large extent in Portugal. All public secondary schools have career guidance services, however, these remain optional; less than half (41%) of Portugal's 15-year-olds reported attending schools where career guidance is mandatory, compared to an average OECD share of 68%. Only half of the wider adult population (25-64 year-olds) were qualified to at least upper-secondary level in 2018, compared to 83% across the OECD. Also, only 15% were enrolled in full-time formal education, compared to 24% on average. This has implications for ensuring that adult skill levels remain relevant as labour markets evolve.

Vocational education and training (VET) can ease entry into the labour market, yet across the OECD, many VET programmes make insufficient use of workplace training. In Portugal, all VET programmes have an academic and a technical component. In total, seven upper-secondary pathways are available: science-humanities, technological, non-dual vocational, specialised artistic, education and training, vocational, and apprenticeship courses. All lead to a school-leaving certificate, and transition across tracks and into tertiary education are available for all, in principle. In practice, however, the OECD (2018) reported that the organisation of upper-secondary schooling may hinder such movement. The share of students following a vocational upper-secondary programme in 2016 was close to the OECD average (41%, compared to 44%) having increased considerably since 2006, although female students continue to be underrepresented. VET is also offered at post-secondary level (Technological Specialisation Courses and Higher Education Professional Technical Courses). According to national data, enrolment at this level increased by two-thirds from 2010 to 2016. However, at 17%, the share of 25-34 year-olds with vocational upper secondary or post-secondary non-tertiary attainment was lower than the OECD average of 25% in 2018.

Higher education in Portugal follows the Bologna model and is offered at universities and polytechnic institutions. The share of 25-34 year-olds with a tertiary-level qualification grew by 12 percentage points between 2008 and 2018, but, at 35%, remains below the OECD average of 44%. The centralised admission process for tertiary education (*Regime Geral de Acesso*) uses a national entrance examination based on the science-humanities curriculum for general upper-secondary education. This may hinder the growing pool of VET graduates: 79% of students completing the scientific-humanistic track had entered higher education one year after completing their studies in 2014, compared to 16% of those in the professional track. Curricular reforms in 2018 (see "Governance") incorporated measures to counter this, including more flexibility within programmes to reduce disparity in content. Furthermore, in 2020, a new special contest for tertiary admissions for VET and specialised artistic graduates was approved and will be implemented from 2020/21.

| Key strengths and challenges in preparing students for the future (pre-crisis analysis)	
Key strengths	**Key challenges**
▪ Higher educational attainment offers important earnings advantages and increasingly improves employability. ▪ The share of early school-leavers has fallen substantially. ▪ Levels of tertiary attainment, particularly among women, have grown considerably.	▪ NEET rates among 20-24 year-olds increased (2008-18) and were comparatively higher among foreign-born adults. ▪ Transition to higher education can be more challenging for upper-secondary VET students. ▪ The educational attainment levels of older adults remain very low.

Recent policies and practices

In 2017, as reported by the OECD (2018), work began on the action phase of the National Skills Strategy (NSS). This followed work by successive governments, with support from the OECD, to build and implement an NSS for Portugal. A diagnostic phase (2013-15), identified 12 key challenges ranging from improving the quality of compulsory education to reducing youth unemployment and targeting adult learning to the low-skilled. The action phase identified 10 concrete actions to improve adult learning across three areas: raising awareness of the value of skills and adults' motivation for learning; improving access, quality and relevance; and strengthening governance and financing. The process involved comparative analysis to identify best practices, collaborative work with an inter-ministerial government team, and extensive engagement with stakeholders, including government, firms, education and training providers, labour unions, employers' associations, academics, and civil society organisations.

Portugal has introduced several reforms to VET. From 2018, following curricular reforms (see "Governance"), VET providers have increased autonomy in designing programmes that could enable them to better meet local needs. A new quality assurance framework for VET courses (2017) which is aligned with the European Quality Assurance Reference Framework for VET (EQAVET) was introduced. From 2017/18 onwards, school-based guidance for students regarding course selection takes into account results from quality assurance processes. The National Credit System (*Sistema Nacional de Créditos*, 2016) reorganised VET curriculum to improve alignment with the ECVET framework and enhance the flexibility, mobility and quality of VET programmes. Syllabus changes in 2013 helped improve transitions between VET, general and tertiary education, as well as introducing more work-based programmes and expanding the offer to include a wider range of higher-skilled occupations, such as electronics, automation and renewable energies. Finally, the national VET integrated strategy (2012-14) has aimed to reinforce the duality of the system. The OECD (2017) reported that, together, these reforms have helped change the traditional bias in Portugal towards general education programmes. In 2015/16, 89% of public upper-secondary schools offered a VET programme indicating considerable progress made towards establishing a more comprehensive upper-secondary system.

The Youth Guarantee Strategy (*Estratégia Garantia Jovem, 2016-20)* builds on the work of the National Plan for Youth Guarantee (*Plano Nacional do Programa Garantia Jovem*, 2013) by supporting those under 25 years old find employment, education, an apprenticeship or a traineeship within four months of becoming unemployed or leaving formal education. The Strategy focuses on developing two key resources: the local partners' network and the *Garantia Jovem* (GJ) electronic platform. Both help identify, register and guide young people, especially long-term NEETs, towards education, training, apprenticeships and job opportunities. They are both supported by public communication campaigns.

Figure 4. Percentage of 18-24 year-olds in education and not in education, by employment status, 2018
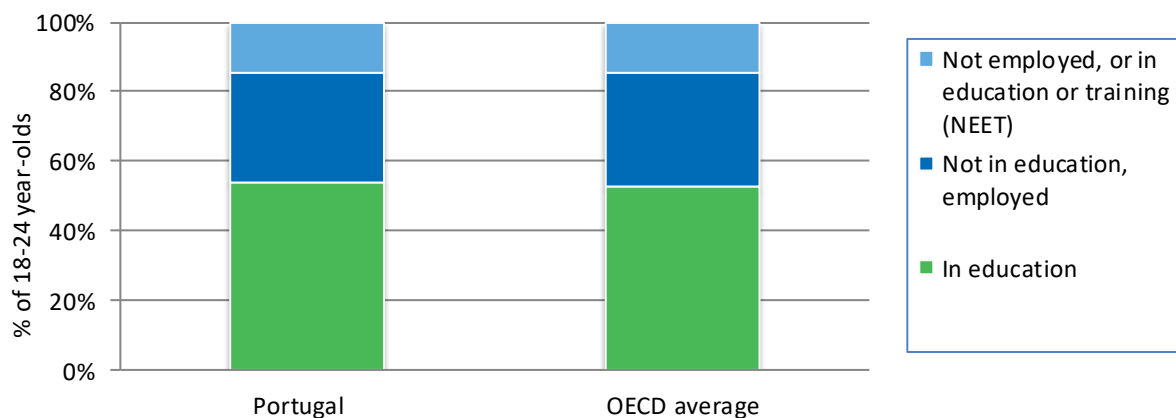
Spotlight 4. Raising educational attainment and participation in lifelong learning among adults

Adult learning has expanded greatly in Portugal since the 2000s, particularly with the National System of Qualifications (*Sistema Nacional de Qualificações*, 2007). However, the sector suffered financial cutbacks during the economic crisis and participation rates fell considerably. Portugal's economy started recovering and the school education system has seen positive developments, providing an opportunity to reinvigorate adult learning.

Portugal's leading policy initiative on adult learning is the Qualifica Programme (*Programa Qualifica*, 2016), an integrated strategy to stimulate the training and qualifications of adults to enhance their employability. It has four primary objectives: 1) improve qualification levels among adults and foster employability; 2) increase digital and functional literacy; 3) align training with labour market needs; and 4) better tailor training pathways to adults' needs. Qualifica targets the unemployed, NEETs and individuals with less than upper-secondary educational attainment. The programme has been working towards the goal of ensuring that, by 2020, 50% of the active population have upper-secondary education qualifications, 40% of 30-34 year-olds have tertiary qualifications, 600 000 NEETs participate in training and 15% of adults participate in lifelong learning activities, growing to 25% by 2025. To achieve these goals, the programme has three key strategic actions:

1) Establish a national network of Qualifica Centres (*Centros Qualifica,* QCs*,* 2016): QCs, which replace the former Centres for Qualification and Vocational Education, aim to reinforce the system's proximity to its target populations. They provide information and guidance, designing training plans for adults and NEETs. They also offer the Recognition, Validation and Certification of Competences (RVCC) process, which provides formal recognition for formal, informal and non-formal learning. This process requires a training component of 50 hours. QCs also provide training activities through partnership networks with employers, providers and municipalities and play an active role in motivating and recruiting adults for lifelong learning.

2) Introduce the Qualifica Passport (*Passaporte Qualifica,* QP, 2017): this user-oriented digital tool records the qualifications and skills individuals have attained, their training pathways and their areas of training interest. It also provides guidance as to recommended pathways to qualification. The QP can be modified and updated at any time, rendering it a tool to support lifelong learning. It is available to any individual, irrespective of enrolment in a training programme.

3) Launch the National Credit System (*Sistema Nacional de Créditos do Ensino e Formação Profissionais*, 2017): this initiative aims to cement Portugal's alignment with the ECVET system. It sets out units of learning outcomes which make up qualifications and can be assessed and validated individually. It is expected that this should enable learners to accumulate learning outcomes gradually and flexibly across different contexts, accumulating them for certification and enhancing learner mobility.

Other action lines include *Portal Qualifica,* an online portal which facilitates access to information, services and tools, and more active alignment with other policy initiatives, such as *Qualifica IT*, introduced via the INCode.30 programme (see "Governance"). The government launched a national media campaign, *Minuto Qualifica,* to raise awareness about the benefits of lifelong learning. It includes 100 short videos describing real-life situations and the impact of adult learning. Qualifica is funded through the state budget and the European Social Fund (ESF) and has been informed by the OECD Skills Strategy Diagnostic Report (2015) and Implementation Guidance (2018).

Qualifica integrates many policy measures already showing positive outcomes of raising the employment prospects of NEETs, jobseekers and the low-skilled. The number of QCs grew from 261 in 2016 to 303 in 2017; and in 2019 there was a contest to open another 50 centres. Between 2015 and 2017, there was an 88% increase in adult participation in training and a 125% increase in prior learning assessment and recognition. The number of adults obtaining a certification increased by 282%, with 10 157 adults certified in 2017. However, challenges remain; the OECD (2018) reported inconsistencies in the impact of the QCs, with quality varying according to staff talent and networks, as well as the institutional structure of the centre (about a third are secondary schools, a third are Public Employment Services centres and the remainder are a mix of private companies, employers' confederations, union training centres, local associations and municipalities). This can be exacerbated by high staff turnover which impedes the strength of the networks. Furthermore, the EC (2019) has noted that the role of "adult educator" itself requires greater professionalisation in order to become a more attractive position. The QP has also been criticised for being too complex; it is currently being updated to be more user-friendly, and a mobile application version is in development. Finally, funding for Qualifica falls below what was available for one of its predecessors, the New Opportunities Initiative (2006-2013), and is reliant on support from the ESF. As the programme continues to expand, ensuring its future financial sustainability is critical.

SCHOOL IMPROVEMENT: DEVELOPING FORMAL STRUCTURES TO SUPPORT TEACHERS' AND SCHOOL LEADERS' PROFESSIONAL DEVELOPMENT

Developing positive **learning environments** for students that enable school leaders and teachers to succeed is essential in raising achievement in schools. In PISA 2018, the share of Portuguese students reporting being bullied at least a few times a month was one of the lowest in the OECD at 14%. However, reported levels of student truancy were higher in Portugal than on average in the OECD, with 28% of 15-year-olds reporting having skipped at least one day of school in the two weeks prior to the PISA 2018 test, compared to an average share of 21%. Furthermore, the disciplinary climate in Portuguese classrooms was, according to students, slightly less favourable than on average across the OECD (see Figure 5). At the same time, Portuguese students reported the highest level of teacher support in the OECD, reflecting a sense of teachers' interest in students' learning and their willingness to provide extra support.

Attracting, retaining and developing good-quality **school leaders** is essential in improving learning environments and promoting effective leadership. The professionalisation of the school leader role has been ongoing in Portugal since 2008, prior to which schools were managed collegially by teaching staff. School management now consists of four bodies: the school leader; the General Council (representatives from the wider school community charged with strategic and operational planning); the Pedagogical Council (co-ordinates pedagogical activities); and the Administrative Council (oversees administrative and financial matters). Also since 2008, in any appointment process where at least one candidate has a school leader qualification from a university, all other candidates must step down. Legislation is also in place for specialised mandatory professional development for school leaders. Despite such progress, principals' leadership of teaching and learning appears to require strengthening; Portugal's index of instructional leadership based on school leaders' reports in PISA 2015 was -0.07. In TALIS 2018, Portuguese principals reported spending more time (32%) on administrative tasks than on curriculum- and teaching-related tasks (13%), the former having increased by 10 percentage points since 2013. Furthermore, in 2018, 23% of school leaders in Portugal had never received instructional leadership training, compared to 17% on average. Obstacles to professionalisation previously identified by the OECD (2018) include the lack of a separate professional pathway for principals and the elected, temporary nature of the office.

Highly-qualified and engaged **teachers** are vital in every education system. Portugal has an ageing teacher population, with 44% of lower secondary teachers aged 50 or over in 2017 (the OECD average was 37%). Primary and secondary teachers in Portugal must complete three and five years respectively of pre-service training, including a teaching practicum. School-based induction is rare: only 20% of principals reported having formal teacher induction activities at their school and only 6% reported that new teachers to a school can access mentoring, compared to OECD averages of 54% and 19% respectively. Participation in professional development is voluntary in Portugal, although it is required for promotion or salary increases. Some 88% of teachers and 98% of principals undertook professional development in the 12 months preceding TALIS 2018, compared to the respective OECD averages of 94% and 99%. The barriers to participation identified most commonly by both were lack of incentives and lack of employer support; in each case, considerably larger shares of Portuguese teachers and principals reported these barriers than on average.

Teaching conditions in Portugal include below-average teaching hours, comparatively high salaries and average class sizes. In 2018, lower secondary teachers taught 612 hours[3], compared to the OECD average of 709 hours. However, Portuguese teachers engage in a range of non-teaching activities including acting as a class or form teacher, student counselling and extracurricular activities. Class size was close to the OECD average in 2017, with 21 and 22 students at primary and lower secondary level respectively, although, given the lower number of teaching hours, student-teacher ratios in schools were more favourable than elsewhere. Minimum and maximum statutory teacher salaries in Portugal were above average and teachers earned between 37% (lower secondary) and 53% (pre-primary) more than other full-time, full-year workers with tertiary education in 2017, the largest advantage in the OECD. School leaders earned almost double the average salary of other tertiary educated workers. Despite these favourable conditions, only 9% of teachers in Portugal reported feeling their profession was valued in society, while only 65% reported that, if they could choose again, they would still become a teacher, compared to the respective OECD averages of 26% and 76%.

| Key strengths and challenges in school improvement (pre-crisis analysis)	
Key strengths	**Key challenges**
▪ Students have reported that they learn in positive environments and feel supported by their teachers ▪ Teachers and school leaders are comparatively well-paid.	▪ Despite policy efforts, principals appear to have low engagement in instructional leadership. ▪ Participation in professional development is hindered by a perceived lack of incentives and employer support.

Recent policies and practices

The three-year Pedagogical Innovation Pilot Project (*Projeto-Piloto de Inovação Pedagógica*, PPIP, 2017-2020) has aimed to improve learning through school-led innovation specifically to reduce early school-leaving rates. Six school clusters from across Portugal have been granted full autonomy to break with legislation in pursuit of innovative solutions to student drop-out and grade repetition. The clusters identify problems, set priorities, mobilise teachers, strategise and share ideas and reflections at regular PPIP network meetings. Strategies may relate to curricula, pedagogy, organisation or community relationships. In 2018, a seventh school cluster joined. Participating schools are supported and overseen by a dedicated monitoring group. An evaluation of the pilot (2019) found that the quality of learning had improved in participating schools and this had positively impacted student retention. Specific pedagogies being strengthened include formative assessment, differentiation and active learning. There have also been secondary benefits in terms of teacher and student wellbeing and strengthened relationships with the community. Promoting school-level innovation and collaboration in this way could be particularly powerful as schools work to mitigate the negative impacts of the COVID-19 pandemic on student learning and seek longer-term resilience (see Spotlight 1).

Portugal has recently consolidated a range of policies to improve working conditions for educational staff and signal greater value for teaching careers. Salary cuts and freezes, in place since 2011, were cancelled in 2017 for both teachers and non-teaching education support staff. This enabled salary and career progression for around 46 000 teachers in 2018. In 2017 and 2018, around 7 000 teaching staff were extraordinarily recruited on permanent contracts and the requirement for conversion from annual to permanent contracts was reduced from five to three successive contracts. In 2017, the government introduced legislation to gradually reduce class sizes, which had increased by 14% in primary education from 2005-17. There has also been increased investment in continuous professional development for teaching and non-teaching educational staff. In 2014, the government established a lifelong training framework for teachers linking professional development to career progression by requiring teachers to engage in 50 hours' training across the 4-year career steps and 25 hours' training across the 2-year career steps in order to advance.

Much of the ongoing teacher professional development in Portugal is carried out by the 91 School Association Professional Development Centres (*Centros de Formação de Associação de Escolas*, CFAE) in place across the country. Decree-Law 22/2014 and Decree-Law 127/2015 were passed to clarify the role of the CFAE as formal institutions in order to support the implementation of the new lifelong training framework. This included giving the CFAE greater autonomy in working with local schools and school clusters to determine training needs. These are then integrated into annual or multiannual training plans for the centres which are accredited by the Scientific-Pedagogical Council of Continuing Professional Development. The CFAE recruit a cohort of volunteer teacher-trainers from local schools and tertiary institutions. The OECD (2018) praised the locally responsive nature of the CFAE but found that impact is restricted as too few teachers take advantage of the training, and the offer needs to be better aligned to the priorities of schools and teachers.

Figure 5. The learning environment according to students, PISA 2018
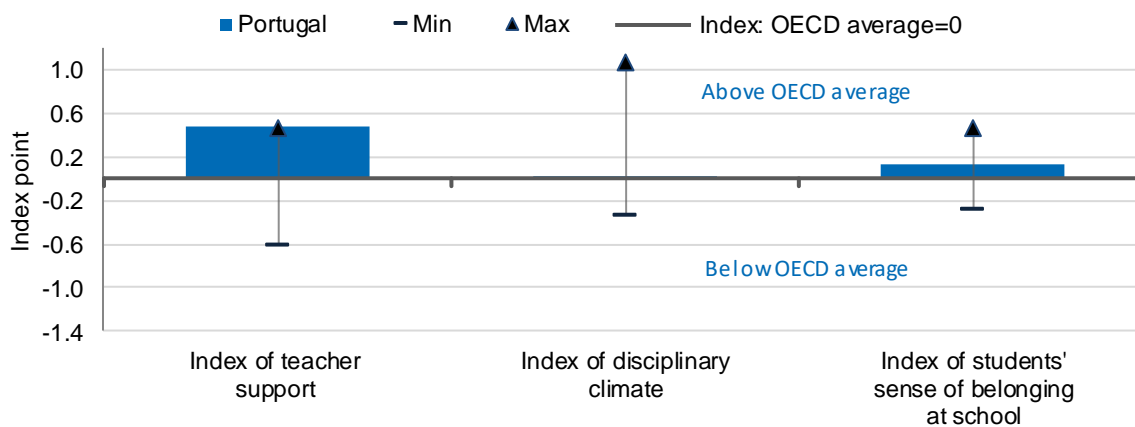
Note: "Min"/"Max" refer to OECD countries with the lowest/highest values.
Source: OECD (2020), *PISA 2018 Results (Volume III): What School Life Means for Students' Lives*, PISA, OECD Publishing, Paris, https://doi.org/10.1787/acd78851-en.

EVALUATION AND ASSESSMENT: ONGOING EFFORTS TO EMBED IMPROVEMENT-FOCUSED COMPONENTS

System evaluation can provide evidence to help decision-makers craft informed policies and increase the transparency of system outcomes. In Portugal, a well-established education indicators framework outlines data to analyse system outcomes, monitor trends and provide information. At the same time, the OECD (2018) has found that Portugal could undertake a more systematic mobilisation of knowledge to inform policy making. The National Council of Education publishes an annual report on the inputs, outputs and outcomes of school education. The Directorate-General for Education and Science Statistics (DGEEC) has responsibility for producing and analysing statistical data. The Educational Evaluation Institute (IAVE) designs and administers national tests, including examinations at the end of lower and upper-secondary education. Results inform performance ratings by institution which take demographic characteristics into account and are published annually by the DGEEC.

Since 2006, efforts have been ongoing in Portugal to leverage **school evaluation** for quality improvement across the education system. School evaluation for pre-primary, basic and upper-secondary education falls under the responsibility of the Inspectorate-General of Education and Science (*Inspeção-Geral da Educação e Ciência,* IGEC) and combines internal self-evaluation and external inspection. According to PISA 2015, schools in Portugal were more likely than average to conduct self-evaluation (99.7%, compared to the OECD average of 93.2%) and receive external evaluations (97.4%, compared to the OECD average of 74.6%). Schools are obliged to perform self-evaluations and develop school improvement plans; this is overseen by IGEC which provides support tools and guidance frameworks. External evaluation occurs every five years and identifies areas to be integrated into school improvement plans. However, both processes tend to place heavier focus on schools' regulatory accountability as opposed to performance. Tertiary institutions carry out internal quality assurance according to their own regulations, overseen by the Agency for Assessment and Accreditation of Higher Education (A3ES).

According to OECD research, **teacher appraisal** can strengthen professionalism and performance, provided it includes both improvement and career progression components. In Portugal, a framework is in place for systematic teacher appraisal which balances assessments of teachers' content knowledge and pedagogical skills, contributions to the school community and ongoing commitment to professional improvement. Since 2007, appraisal is generally carried out every four years by external or internal evaluators and a positive evaluation is required for career progression. However, in part as a consequence of the freeze on teachers' career progression (2011-2017), implementation has been limited. Teacher appraisal levels, as reported in TALIS 2018, were lower than average: 24% of Portuguese teachers had principals who reported that their teachers are formally appraised at least once a year, compared to an OECD average of 63%. The process may also lack a developmental focus; in 2018, 39% of teachers' principals reported that formative discussions follow appraisal either most or all of the time compared to an OECD average of 63%, and 25% had principals who reported that a development or training plan is mostly or always put in place after appraisal, compared to 46%. In 2015, only 41% of students attended schools whose principal reported that teachers' practice was monitored by internal observation, and 31% in which teachers' practice was monitored by external observation, compared to OECD averages of 81% and 42%, respectively.

The extent and ways in which a system uses **student assessment** can vary depending on need, however, there is a broad consensus that strengthened student assessment is important in generating data and processes to stimulate education improvement. Portugal has a dual approach to national student assessments: in Years 2, 5 and 8 (mid-cycle), holistic, formative assessments are administered; in Years 9 and 12 (end-of-cycle), students sit summative national examinations. While policy promotes a diverse use of assessment instruments, Portuguese educators face the challenge of balancing this with teaching for high-stakes examinations. In PISA 2015, school leaders reported that they were more likely to use standardised student assessment data to compare their school with others (73%) than for developmental purposes, such as improving the curriculum (66%) or adapting teaching to students' needs (50%). Furthermore, in PISA 2015, the share of students whose principal reported that standardised tests inform decisions on students' promotion or retention was higher than average at 56%, compared to 31%. Nevertheless, teachers seem aware of changing assessment practices; the share of teachers in TALIS reporting a need for professional development related to student assessment increased between 2013 and 2018 by 3.6 percentage points. As school closures during the COVID-19 pandemic disrupted standardised assessment schedules (see Spotlight 1), the importance of continuous formative assessment was emphasised further.

| Key strengths and challenges in evaluation and assessment (pre-crisis analysis)	
Key strengths	**Key challenges**
- A range of data is produced and published by dedicated bodies within the Ministry for Education. - Recent policy efforts emphasise the developmental components within school evaluation, teacher appraisal and student assessment.	- With increased access to system-level data, Portugal could continue to strengthen the mobilisation of knowledge for decision-making. - Implementing policy reform in this area has been challenging, limiting impact and culture change.

Recent policies and practices

The Comprehensive Model for External Student Assessments - Basic Education (*Modelo Integrado de Avaliação Externa das Aprendizagens no Ensino Básico*, 2016), replaced end-of-cycle examinations in grades four and eight with standardised, lower-stakes national assessment in grades two, five and eight. Results of the assessments have no impact on final grades; instead, schools and families use them to improve understanding of students' learning processes and to target teaching and support to reduce school failure. National examinations were introduced in grade 9, at the end of basic education (primary and lower secondary). The model relies on a clear set of premises: 1) leveraging diverse use of assessment to improve students' learning and academic success; 2) employing continuous assessment as the main instrument of internal school evaluation and using external evaluation to enhance assessment approaches; 3) extending the scope of external student assessment to avoid curricular narrowing; and 4) committing to reporting quality and pertinent assessment information to schools, families and students in order to drive action and build trust. Initial implementation took place in a number of schools in 2016.

Portugal has been developing national information management systems to improve the utility of educational data. The InfoESCOLAS Portal (2015) provides data for all public and government-dependent schools and students from grades five to twelve. It offers access to results of internal and external assessment, as well as information about school partnerships with other schools and the community. Escola 360° (2017) centralises all administrative information about students, from pre-school to upper-secondary education, with the aim of facilitating collaboration among stakeholders. Following a pilot in 10 schools in 2017, it is being rolled out to all associated public and private institutions from 2018 with the aim of streamlining information management across the education system.

External School Evaluation (*Avaliação Externa de Escolas*, AEE, 2006) has been reviewed on an ongoing basis. Evaluations are carried out on a five-year basis and use a streamlined three-dimension framework since the second cycle (2011-2017) that consists of: school outcomes, education service, leadership and management. In 2016, Portugal created a working group of academic experts, staff from the Inspectorate-General of Education and Science, school representatives and government advisors to revise the evaluation model, enhancing its formative focus. The third evaluation cycle launched in 2019, with a revised model widening the programme's goals and the scope of its action. This includes strengthening the information garnered from evaluations and providing greater support to schools, enhancing their capacity to ensure quality learning for all students and across all the competences defined within the new Profile of Students at the End of Compulsory Schooling. There is also a much stronger focus on classroom-level practices and inclusive education. Several positive aspects of external school evaluation have been identified, such as the contribution these cycles make to enhancing professionalism and trust in schools. However, Portugal also needs to balance aspects of implementation in order for the next cycle to succeed. This includes establishing a system that is objective and produces substantive results, while continuing to recognise and promote the specificities of schools and their autonomy, as well as avoiding an excessively administrative focus and effectively engaging a wide range of stakeholders. The third cycle (2019-24) aims to address some of these challenges directly.

Figure 6. Percentage of students in schools where the principal reported assessments of students in national modal grade for 15-year-olds, PISA 2015
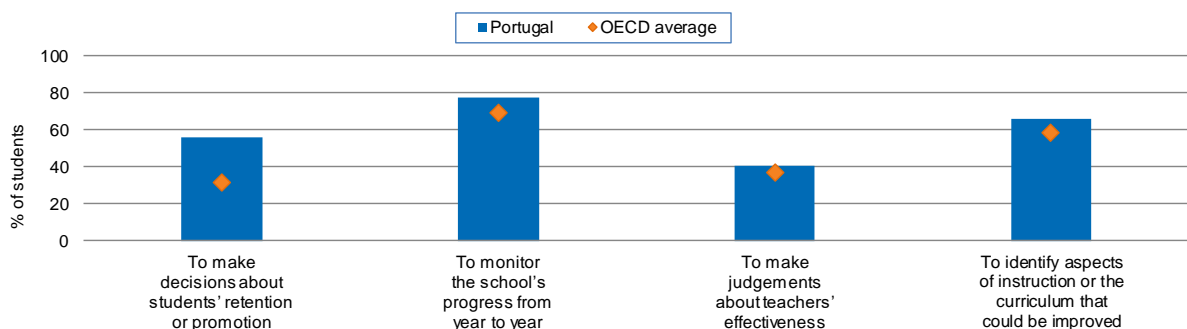
Source: OECD (2016), *PISA 2015 Results (Volume II): Policies and Practices for Successful Schools*, PISA, OECD Publishing, Paris, http://dx.doi.org/10.1787/9789264267510-en.

GOVERNANCE: MEASURES TO INCREASE AUTONOMY AND STREAMLINE STRUCTURES SHOULD FOCUS ON RAISING SYSTEM QUALITY

In Portugal, multiple ministries are responsible for education. The Ministry of Education (MoE) defines the curriculum, guidelines for national examinations, teacher recruitment and deployment, as well as the budget for compulsory school education (primary to upper secondary). The Ministry of Labour, Solidarity and Social Security (MTSSS) and the MoE are jointly responsible for ECEC and vocational and further education and training. The Ministry of Science Technology and Higher Education (MCTES) is in charge of higher education. Other relevant bodies and ministerial structures include:

- The Educational Evaluation Institute (2013) is a fully autonomous body specialising in external evaluation.
- The National Education Council (*Conselho Nacional de Educação*) is an independent body advising on educational issues and supporting stakeholder participation in pursuit of policy consensus.
- Regional Secretariats for Education in the Autonomous Regions of the Azores and Madeira develop regional plans for national education policy and manage human and financial resources.
- The Schools' Council represents the viewpoint of schools through school leaders' representatives and acts as an advisory body.
- The National Agency for Qualification and Professional Education (ANQEP) co-ordinates the implementation of policies related to vocational and further education and training.
- The Inspectorate-General for Education and Science (IGEC) ensures the legality of actions taken by the MoE and the MCTES and monitors, audits and supervises the functioning of educational institutions.

Key **education stakeholders** include the National Association of Portuguese Municipalities (*Associação Nacional de Municípios Portugueses*) and the National Confederation of Parents' Associations (*Confederação Nacional das Associações de Pais*). The largest professional association representing teachers is the National Federation of Teacher Unions (*Federação Nacional dos Professores*) covering around half of all unionised teachers.

Historically a highly centralised system, Portugal has made several reforms to **schooling decisions** to increase decision-making at sub-national levels. In pre-primary and basic education, municipalities are responsible for providing extracurricular activities, school meals and transportation, and for compensating non-teaching staff. Following a major consolidation process initiated in 2005, 98% of schools are now aggregated into clusters under an executive principal, supported by a number of deputies and school co-ordinators. Since 2006, the MoE has developed autonomy contracts with a growing number of schools and clusters (currently encompassing around 25% of public schools). High performing schools may voluntarily become more autonomous on four-year contracts, gaining greater control over finances, and in some cases curriculum. However, in comparative terms, school autonomy levels remain lower than the OECD average (see Figure 7): in PISA 2015, 36% of Portuguese principals reported that the school has primary responsibility for resource allocation and 68% for curriculum compared to OECD averages of 54% and 73%. Nevertheless, while previous decentralisation measures have tended to focus on operational and administrative matters to improve efficiency, recent curricular reforms (see Spotlight 5) and the PNPSE (see "Equity and Quality") have adopted implementation models that centre on leveraging greater school autonomy to enhance educational outcomes. This may have helped develop greater capacity at school and local level to implement rapid responses to the challenges posed by the COVID-19 pandemic (see Spotlight 1).

National-level policy-making dominates Portuguese **higher education** although higher education institutions (HEIs) have attained greater autonomy since 2007. Some HEIs have adopted a model governed by a General Council, a Rector and a Management Council who are overseen at the institutional level by a Board of Trustees, composed of internal and external stakeholders and appointed by the government following the proposal of the General Council. This has reduced collegial decision-making processes and strengthened relationships with external stakeholders. Portugal has also created external agencies to implement different aspects of research and innovation policy, as well as dedicated management entities and co-ordination bodies to oversee implementation of EU funds in the field of higher education. However, the OECD (2019) has previously reported that the sector could benefit from greater horizontal policy co-ordination across government.

Key strengths and challenges in governance (pre-crisis analysis)	
Key strengths	**Key challenges**
▪ School consolidation processes have brought professionals in previously isolated schools into collaboration with colleagues. ▪ New governance structures in HEIs have helped foster collaboration with external stakeholders.	▪ Nascent efforts to better focus growing autonomy for schools on enhancing educational outcomes for students should be strengthened. ▪ Shared ministerial governance structures in VET and ECEC and a crowded governance system in higher education may impede clarity.

Recent policies and practices

An external evaluation of pre-school education in 2013 led to curriculum revision. Updated Curriculum Guidelines for Pre-School Education (*Orientações Curriculares para a Educação Pré-escolar*, OCEPE, 2016) aimed to improve alignment with the first cycle of basic education and encourage collaboration between educators during students' transition to primary education. OCEPE is both a reference for curriculum development and a set of general pedagogical and organisational principles for ECEC professionals. It promotes an integrated and globalised approach to content areas, providing practical examples of learning processes and staff reflection. Adding Physical and Artistic Education to the curriculum has broadened its scope. To support implementation, 38 trainers were recruited to run local training sessions (by September 2018, 900 pre-school teachers had received training). The MoE and MTSSS are currently developing Pedagogical Guidelines for Crèches to reinforce an integrated approach.

The National Digital Competences Initiative 2030 (*INCoDe.2030*, 2017), a cross-sectoral approach to enhancing digital competencies, has five areas of action: inclusion, education, research, qualification and specialisation. INCoDe.2030 has aimed to reach 20 000 enrolments in digital literacy programmes by 2020; invest 2% of gross domestic product (GDP) in Research and Development (R&D) by 2025; and ensure 80% of the population have basic digital skills by 2030. In education, measures include integrating digital skills and resources into teaching, developing digital resources, extending the information and communications technology (ICT) curriculum and designing an ICT reference framework for younger students. The first two, in particular, helped Portugal implement distance learning during the COVID-19 pandemic (see Spotlight 1). New programmes are in place to requalify unemployed graduates with digital competences and offer short-cycle tertiary qualifications in digital skills. The National Observatory of Digital Competencies is responsible for monitoring progress and a High-level International Advisory Board has been established to provide external analysis of planned and ongoing activities. The EC (2019) has reported that despite these efforts, digital skills gaps are still growing.

The National Education Strategy for Citizenship (*Estratégia da Educação para a Cidadania*, 2017) was set up to support children and young people to acquire citizenship skills and knowledge throughout their education. The strategy created mandatory teaching areas such as democratic institutions, human rights, gender equality, environmental sustainability and health education. Initially adopted in Projeto de Autonomia e Flexibilidade Curricular (PAFC) schools (see Spotlight 5), the government has since launched a national training programme for at least one representative per school.

The Co-ordinating Council for Higher Education (CCHE, 2016) is an advisory body for higher education. It is comprised of stakeholders from each sector of the system, supported by higher education experts (domestic and international). However, the CCHE has neither a staff nor dedicated budget which, according to the OECD (2019), limits its ability to effectively provide a stable framework of national priorities.

The Programme for the Modernisation and Valorisation of the Polytechnic Sector (*Programa de Modernização e Valorização dos Institutos Politécnicos*, 2016), aims to modernise the model of polytechnic higher education and applied research and improve perception. Over EUR 65 million have been assigned across two main components: investing in operations and equipment to improve the quality of higher education professional technical courses, and supporting practice-based R&D activities in consortia of polytechnics. A total of 28 poytechnic-run research units were considered for multiannual funding in 2017/18 and polytechnics take part in or lead five of the 26 Collaborative Laboratories already approved. Portugal is also working to enable polytechnics to award doctorates.

Figure 7. Percentage of decisions taken at each level of government for public lower secondary schools (2017)
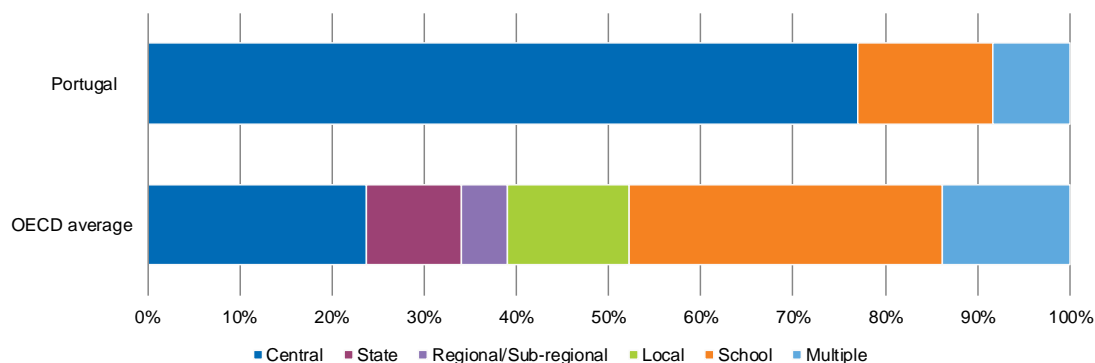
Note: This figure considers four domains of decision-making: 1) Organisation of instruction; 2) Personnel management; 3) Planning and structures, and; 4) Resources.
Source: OECD (2018), *Education at a Glance 2018: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/eag-2018-en.

Spotlight 5. Implementing curricular reform through empowering schools to innovate

In 2017, Portugal published a new framework for teaching, learning and assessment delineating what young people are expected to achieve by age 18. The Students' Profile at the End of Compulsory Schooling (*Perfil dos Alunos à Saída da Escolaridade Obrigatória,* 2017) establishes Essential Learnings for each discipline at all levels of compulsory schooling and embraces the idea of transversality, calling upon each curriculum area to develop all competency areas defined in the Students' Profile. The development of the framework followed a comprehensive process, which drew on international research and reference frameworks, expert consultation, meetings with teachers, administrators and parents, and student voice. Portugal has also taken part in the OECD's Future of Education and Skills: Education 2030 project.

Given the holistic nature of the framework and the fact that, although it determines what should be achieved by the end of schooling, it does not dictate how schools and professionals are to get there, the government introduced new measures recognising schools and teachers as the agents of curriculum development and affording them the freedom to experiment with that agency. The MoE invited public and private educational institutions to volunteer to take part in the Project for Autonomy and Curricular Flexibility (*Projeto de Autonomia e Flexibilidade Curricular,* PAFC, 2017) pilot programme during the 2017/18 school year.

PAFC grants schools voluntary autonomy over 0-25% of their total curriculum time, enabling them to design learning experiences in line with the aims of the Profile. The innovations must follow one or more guiding principles: improving teaching and learning, especially through interdisciplinary approaches; embracing curricular autonomy and flexibility; fostering an inclusive school environment; implementing citizenship education; valuing internal and external assessments of and for learning; improving alignment between education levels; and mobilising various stakeholders.

The pilot phase was supported by a clear, consistent and comprehensive national implementation plan based on a strategy that mirrored the project's focus on flexibility, dynamism, communication and reflection. Five regional teams were established to support and monitor implementation in participating schools, consisting of representatives from the most relevant central agencies and bodies. These teams are the first point of support for schools and were also tasked with promoting learning within and between schools. A national level technical support team was also established to ensure horizontal (across regions) and vertical (across governance levels) alignment, and manage data collection and digital support tools. A national co-ordination team consisting of the directors of various central agencies ensures alignment with other policies and conducts the overall monitoring and evaluation.

Around 235 public and private schools were involved in the pilot, which covered students from grades one, five, seven and ten and year one of vocational courses. Two main studies have taken place since then, both of which surveyed or interviewed a range of stakeholders. These were an OECD expert review (2018) and a national report (2018) led by an external evaluation team from the University of Porto. The OECD praised the comprehensive consensus-building efforts during the development and pilot phases, the Ministry's openness to feedback and the heightened energy and enthusiasm witnessed among students and staff. The OECD also found that the reform has legitimised certain pedagogies such as project-based learning, interdisciplinary and student-centred approaches and self-directed learning. Finally, the OECD also identified a heightened collaboration among all stakeholders involved in the project. Much of this was echoed in the national report, which observed more collaborative leadership and collegial working in schools, as well as some reported enhanced student engagement and improved behaviour.

Nevertheless, there are ongoing challenges. The national evaluation found considerable heterogeneity in implementation approaches and teacher buy-in. School teams often perceived a lack of time and space to collaborate, which, along with the administrative burden of teaching multiple classes and large class sizes, impeded their ability to fully engage. In particular, teachers require support with student assessment, interdisciplinary learning and effective organisation of learning. The OECD noted a need to anticipate and address possible sources of tension between the reforms and the largely centralised and highly prescribed system that Portugal has traditionally favoured. This relates to mitigating a "culture clash" as students and staff navigate between innovation and tradition.

Both reports offer recommendations; the OECD stated that schools should continue to be recruited on a voluntary basis and regional and national teams must strive to maintain a sense of community as participant numbers increase. Portugal should also channel resources into capacity building and establish lighthouse schools which can help cascade good practice. In the longer term, Portugal could align higher education entrance with the Profile. The national team encouraged the development of a broader set of initiatives, coordinated by expert groups, to support schools with assessment, interdisciplinarity and innovative approaches to learning organisation. They also suggested establishing a national observatory to monitor progress and foster synergies.

These evaluations informed the introduction of new curriculum principles of autonomy and curricular flexibility (Decree-Law 55/2018). Regional teams have been established to monitor and support schools by means of local school networks to ensure the correct implementation of the new curriculum design (Decree-Laws 54 and 55) at the local and national level. These teams and support structures proved a useful resource in the Portuguese education system's initial response to the COVID-19 pandemic (see Spotlight 1).

FUNDING: INCREASING SHARE OF PRIVATE EXPENDITURE

Portugal's **overall expenditure on education** as a proportion of GDP, at 5%, is similar to international averages. In 2016, Portugal spent 3.9% of GDP on primary, secondary and post-secondary non-tertiary education (the OECD average was 3.5%), with a smaller share of GDP dedicated to tertiary education than on average (1.2% in Portugal compared to 1.5% across the OECD). Nevertheless, per-student spending in Portugal in 2016 was generally below average: Portugal spent USD 7 451 per child enrolled in pre-primary education (the OECD average was USD 8 349), USD 7 689 per student in primary education (the OECD average was USD 8 470) and USD 11 014 per student at tertiary level (the OECD average was USD 15 556). Per-student funding at secondary level was slightly above average at USD 9 999 compared to USD 9 968. At the same time, the share of current expenditure for primary to tertiary education dedicated to staff compensation in the public sector in 2016 was one of the highest in the OECD, at 85%, compared to 78% on average (See also "School Improvement").

Almost one-third of Portuguese schools are privately run although they only serve around one-fifth of students. Generally, private schools are self-financed through attendance fees but, in some cases, temporary measures are in place to provide state funding to private institutions in order to meet demand. This is most common in the ECEC sector where settings are jointly financed by the MoE and MTSSS. Private independent schools serve all levels but especially ECEC, the first cycle of primary education and upper secondary VET. In 2016, the share of total expenditure on education coming from private sources (including international sources) was above the OECD average at 19.3%, compared to 17.4%. At pre-primary, 64% of expenditure came from public sources in 2016; the remaining 36% came from households, which was more than the average share of 16%. The relative proportion of public expenditure on primary to tertiary education decreased by 10 percentage points between 2010 and 2016 while private expenditure increased by 6.4 percentage points constituting some of the biggest changes in the OECD.

Most funding in Portugal for **primary and secondary schools** is directly transferred from the MoE to the school or school cluster. However, municipalities have progressively gained more discretion over fund distribution, mostly in pre-primary to lower secondary education. In 2016, 82% of the funds for primary, secondary and post-secondary non-tertiary education were raised at the central level; municipalities contributed 11% of public spending, compared to an OECD average of 25%. Although a funding formula exists for the money transferred to municipalities, all other school funding is determined through administrative discretion based on historical trends, and schools can negotiate the amount of funding they receive. This system poses some challenges; in PISA 2018, school principals in Portugal reported some of the highest levels of staff and material shortages in the OECD, with indices of 0.82 and 0.48 respectively, compared to OECD averages of 0.01 and 0.00. Nevertheless, unlike in many other OECD countries, these shortages were not more strongly perceived in disadvantaged schools. Public schools and clusters may raise complementary revenue through services to the community or fundraising and can apply for additional resources to develop specific projects and activities. These include targeted programmes addressing equity concerns, such as TEIP3 and PNPSE (see "Equity and Quality") or School Social Assistance (*Ação Social Escolar,* ASE*,* 2009) which supports students living in poor conditions based on an application submitted by school-based social workers. ASE supported 35% of students in 2018.

The Portuguese education system receives financial support from the European Union's European Structural and Investment Fund (ESIF), primarily through the European Social Fund, which principally funds human capital development, and the European Regional and Development Fund for education infrastructure. Between 2014 and 2020, the ESIF plans to invest EUR 5.2 billion in the Portuguese education system. Key projects that have received European funds include the expansion of VET provision and the TEIPs.

Higher education is funded from the state budget (60%) supplemented by tuition fees, European funds and institutionally raised funds. HEIs have financial autonomy and are subject to audits by the Court of Auditors and MCTES. Between 2005 and 2016, Portugal's tertiary spending per student fell by 6% whereas average OECD levels grew by 8%. Portugal's spending on R&D is similar to the OECD median, although around one-third is provided through the ESIF. All tertiary students in Portugal pay tuition fees, with a fixed maximum amount of EUR 697 in 2020/21 for undergraduate and advanced degrees for certain professions; for second and third cycle, fees are determined by each institution. Needs-based public financial support reaches around one-fifth of students; allocations varied from EUR 1 063 to EUR 5 698 for 2017/18. Merit-based scholarships of up to EUR 3 175 for 2020/21 include a performance-based element with supplements for those with high grades.

| Key strengths and challenges of funding the education system (pre-crisis analysis)	
Key strengths	**Key challenges**
▪ Overall expenditure as a percentage of GDP has been in line with international standards. ▪ Additional financial resources available at school and student level in basic and tertiary education can help address equity challenges.	▪ Private and international sources appear to have a growing role in funding education. ▪ School funding criteria need greater clarity and can be based on administrative discretion, past trends and schools' negotiation capacity.

Recent policies and practices

Portugal's Schools' Participatory Budget (*Orçamento Participativo das Escolas,* 2016) allocates all public secondary schools EUR 1 per student, to be used according to students' wishes. Students develop proposals for school improvement, secure a minimum number of signatures from their peers and then submit to the principal. Once approved, proposals are voted on by all students. This helps reinforce students' engagement with the community and their civic values. In 2017, 93% of schools took part, receiving over 4 000 student proposals in total.

In 2017, the system of study grants for tertiary students (Despacho No. 5404/2017) was changed to increase efficiency and better respond to the needs of disadvantaged students. This included a move to multi-year grants to avoid students having to reapply annually. The application review procedures were also standardised and rationalised to create more parity, as well as being fully digitised to encourage decisions to be made more rapidly. A new system of study grants for those with special educational needs was also introduced (Despacho 8584/2017).

Portugal has made several efforts to improve efficiency within the education system. In 2018, the government limited state funding for private schools to localities where the public offer is insufficient. Teachers' salary payments were centralised and stronger regulations around medical leave introduced. Consolidation of the school network since 2004 has seen small, isolated schools closed or merged. Furthermore, the policy of clustering schools under one leadership team lowered expenditure on managerial staff and reduced the number of isolated schools. The National Council for Education (CNE) (2017) found that more than 47% of public schools had closed by 2014. According to the OECD (2018), consolidation has been well-received thanks to clustering, community consultation, transport provision and infrastructure investment. Just in the period 2012-2014, efficiency measures in pre-primary to upper-secondary education resulted in estimated savings of over EUR 1.1 billion, although much of these savings were due to emergency or temporary measures in response to the financial crisis.

The Institute for the Management of Educational Finance (*Instituto de Gestão Financeira da Educação,* IGeFE, 2015) has developed various digital initiatives to improve efficiency. The financial management of all schools and educational services is centrally held via a digital platform, SmartMEC (2015). This aims to improve accessibility, quality and utility of information. A mobile application enabling school staff to access updated school information has been launched, as has a central repository for financial data (SIGeFE), which facilitates the centralisation of salary payments. Several digital tools support financial planning, including a predictive analysis platform for financial and budgetary evolution (PredictionME) and a tool for monitoring school resources contracts with municipalities.

Figure 8. Annual expenditure per-student (2016) and recent trends, by level of education
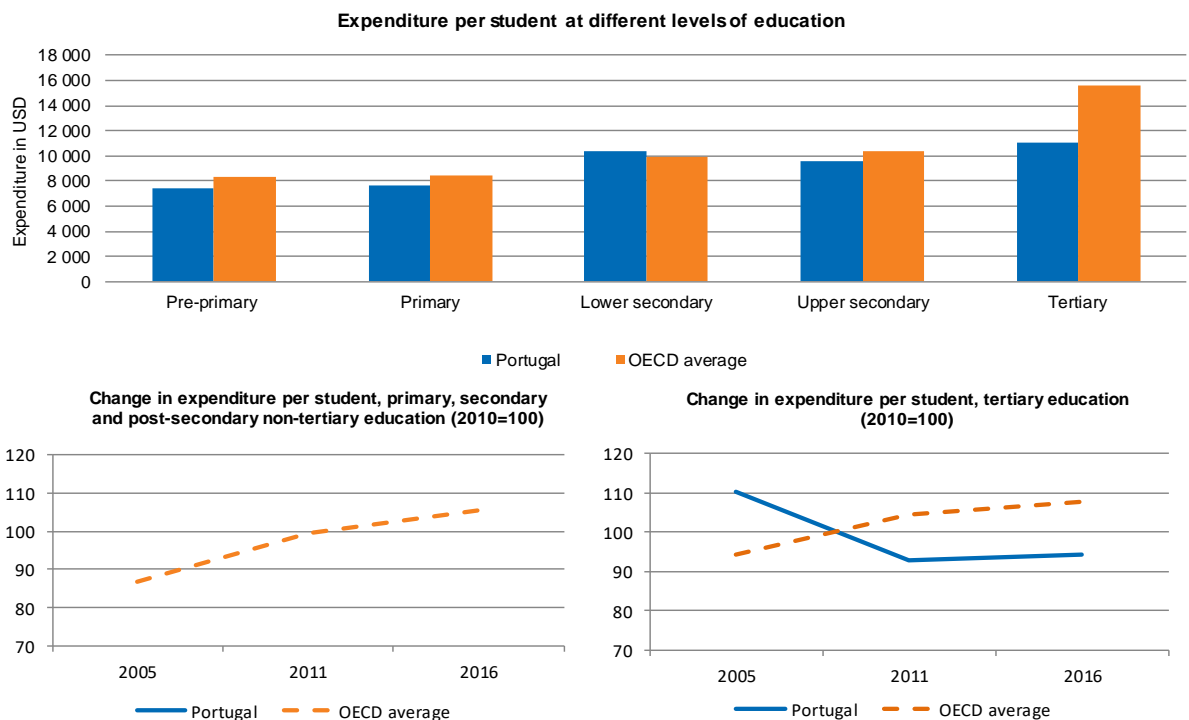
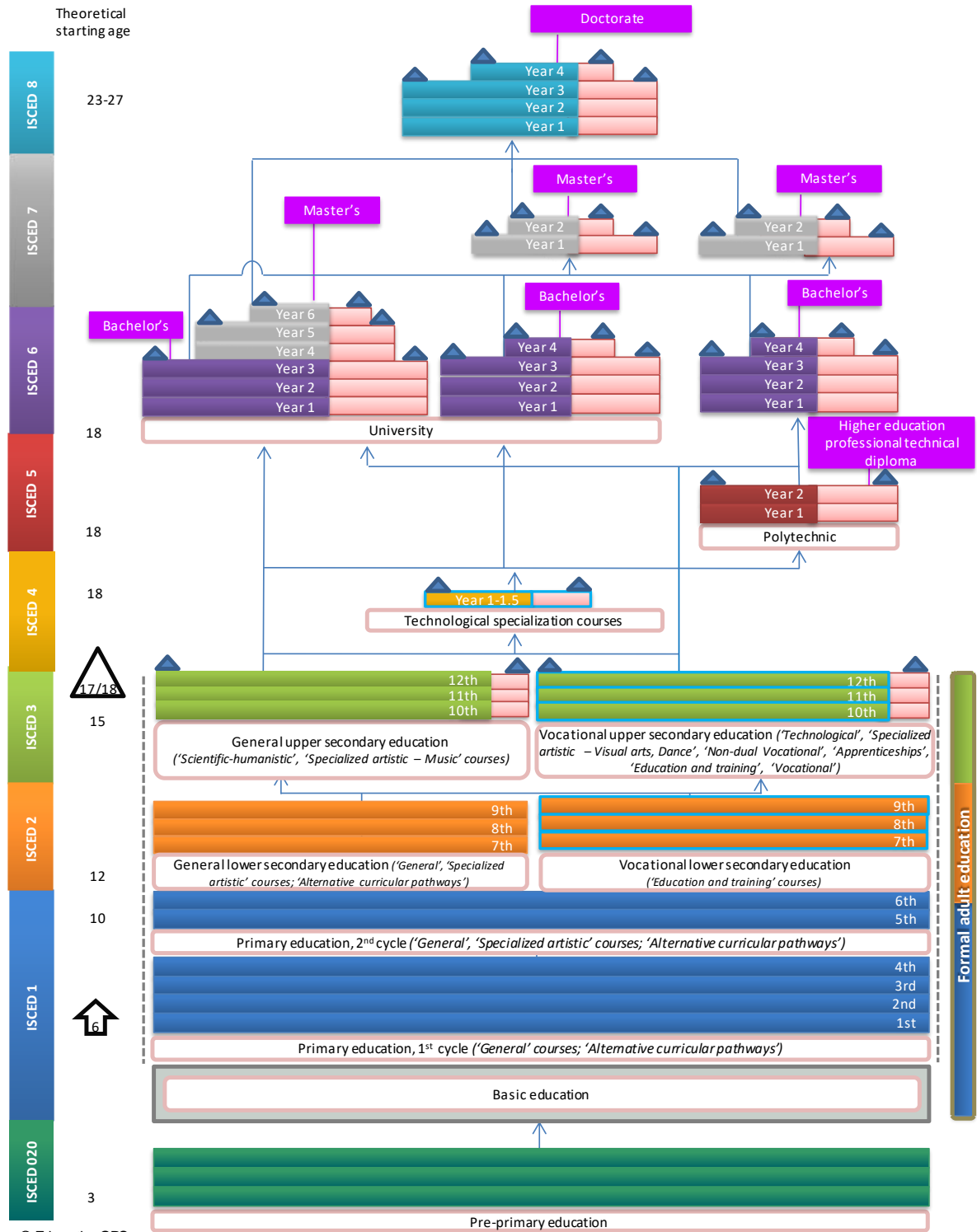*Source*: OECD (2019), *Education at a Glance 2019: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/f8d7880d-en.

ANNEX A: STRUCTURE OF PORTUGAL'S EDUCATION SYSTEM

Portugal   2018

ANNEX B: STATISTICS

#	List of key indicators[1,2,3]	Portugal	Average or total	Min OECD	Max OECD
	Background information				
	Economy				
1	GDP per capita, 2016, in equivalent USD converted using PPPs (OECD Statistics)	31 043	42 441	14 276	107 775
2	GDP growth, 2016 (OECD Statistics)	2.0%	1.8%	0.6%	6.6%
	Society				
3	Population density, inhab/km^2, 2017 (OECD Statistics)	113	37	3	517
4	Population aged less than 15 as a percentage of total population, 2018 (OECD Data)	13.8%	17.0%	12.2%	28.4%
5	Foreign-born population as a percentage of total population, 2018 or the most recent available year (OECD Data)	8.6%	14.4%	0.8%	47.6%
	Education outcomes				
6	Mean performance in reading (PISA 2018)	492	487	412	523
7	***Average three-year trend in performance across PISA assessments, by domain (PISA 2018)[4,5]***				
	Reading performance	**4.3**	0.4	**-4.9**	**7.1**
	Mathematics performance	**6.0**	-0.6	**-9.1**	**6.4**
	Science performance	**4.3**	-1.9	**-10.7**	**6.4**
8	Enrolment rates of 3-year-olds in early childhood education and care, 2017 (EAG 2019)	86.4%	79.3%	2.4%	100%
9	Percentage of 25-64 year-olds whose highest level of attainment is lower secondary education, 2018 (EAG 2019)	20.3%	14.4%	0.8%	39.9%
10	***Educational attainment of the population aged 25-34 by type of attainment, 2018 or latest available***				
	At least upper secondary education, 2018 (EAG 2019)	71.5%	85.4%	50.1%	97.8%
	Tertiary education, 2018 (EAG 2019)	35.1%	44.3%	23.4%	69.6%
	Vocational upper secondary or post-secondary non-tertiary education, 2018 (EAG database 2020)	17.3%	24.5%	1.8%	50.1%
11	***Unemployment rates of 25-34 year-olds by educational attainment, 2018 (EAG 2019)***				
	Below upper secondary	8.4%	13.7%	3.0%	37.3%
	Upper secondary and post-secondary non-tertiary	8.0%	7.3%	2.5%	25.1%
	Tertiary education	6.4%	5.5%	1.7%	23.2%
	Students: Raising outcomes				
	Policy lever 1: Equity and quality				
12	First age of selection in the education system (PISA 2018)	15	14	10	16
13	***Students performing at the highest or lowest levels in reading (%) (PISA 2018)***				
	Students performing below Level 2	20.2%	22.6%	11.1%	49.9%
	Students performing at Level 5 or above	7.3%	8.7%	0.8%	15.0%
14	Percentage of students in schools where students are grouped by ability into different classes for all subjects, PISA 2015	4.3%	7.8%	0.0%	56.1%
15	Percentage of students whose parents reported that the schooling available in their area includes two or more other schools, PISA 2015	26.0%	36.8%	20.4%	56.9%

#	List of key indicators[1,2,3]	Portugal	Average or total	Min OECD	Max OECD
16	Percentage of students reporting that they have repeated at least a grade in primary, lower secondary or upper secondary schools (PISA 2015)	31.2%	11.3%	0.0%	42.6%
17	Percentage of variance in reading performance in PISA test explained by ESCS (PISA 2018)[4]	13.5%	12.0%	6.2%	19.1%
18	Score difference in reading performance in PISA between non-immigrant and immigrant students AFTER adjusting for socio-economic status (PISA 2018)[4]	**-26**	**-24**	**-80**	**16**
19	Score difference between girls and boys in reading (PISA 2018)[4]	**24**	**30**	**10**	**52**
Policy lever 2: Preparing students for the future					
20	Mean proficiency in literacy among adults aged 16-64 on a scale of 500 (Survey of Adult Skills, PIAAC, 2012)	NP	267.7	220.1	296.2
21	Difference in literacy scores between younger (25-34) and older (55-65) adults AFTER accounting for age, gender, education, immigrant and language background and parents' educational attainment (Survey of Adult Skills, PIAAC, 2012).	NP	15.6	-8.3	37.6
22	***Share of students in upper secondary education in 2017 following:***				
	General programmes (OECD Stat - INES 2020)	59.3%	58.1%	27.6%	100.0%
	Vocational programmes (OECD Stat - INES 2020)	40.7%	43.1%	9.0%	72.4%
	Combined school and work-based programmes (OECD Stat - INES 2020)	a	18.3%	1.0%	58.0%
23	First-time graduation rates from tertiary education, 2017 (Below the age of 30, excluding mobile students / OECD Stat - INES 2020)	40.8%	36.6%	10.1%	49.9%
24	Percentage of 18-24 year-olds not in education, employment or training, 2018 (EAG 2019)	14.5%	14.3%	5.9%	29.8%
Institutions: Improving schools					
Policy lever 3: School improvement					
25	***The Learning Environment - PISA 2018***				
	Mean index of teacher support in language-of-instruction lessons	0.47	0.01	-0.61	0.47
	Mean index of disciplinary climate	0.01	0.04	-0.34	1.07
	Mean index of students' sense of belonging	0.12	0.00	-0.28	0.46
26	Percentage of teachers in lower secondary education aged 50 years old or more, 2017 (EAG 2019)	43.6%	37.0%	6.3%	54.2%
27	***Number of teaching hours per year in public institutions by education level, 2018 (EAG 2019)[7]***				
	Primary education	774	783	561	1063
	Lower secondary education, general programmes	612	709	481	1063
28	Ratio of actual teachers' salaries to earnings for full-time, full-year adult workers with tertiary education, lower secondary education, general programmes, 2016 (EAG 2019)	1.37	0.88	0.64	1.40
29	Proportion of teachers who believe the teaching profession is valued in society (TALIS 2018)	9.1%	25.8%	4.5%	67.0%
30	Proportion of teachers who would become a teacher again if they could choose (TALIS 2018)	64.8%	75.6%	54.9%	92.2%

#	List of key indicators [1,2,3]	Portugal	Average or total	Min OECD	Max OECD
	Policy lever 4: Evaluation and assessment to improve student outcomes				
31	***Percentage of students in schools where the following arrangements aimed at quality assurance and improvement at school are used (PISA 2015):***				
	Internal/Self-evaluation	99.7%	93.2%	74.8%	100.0%
	External evaluation	97.4%	74.6%	20.8%	97.4%
32	***Percentage of students whose school principals reported that standardised tests are used for the following purposes (PISA 2015):***				
	To make decisions about students' retention or promotion	56.1%	31.3%	3.4%	60.6%
	To monitor the school's progress from year to year	77.8%	69.4%	26.2%	97.7%
	To make judgements about teachers' effectiveness	40.3%	37.0%	4.4%	87.5%
	To identify aspects of instruction or the curriculum that could be improved	65.9%	58.9%	14.1%	92.4%
33	Percentage of lower secondary teachers whose principals report conducting formal appraisal of their teachers at least once per year (TALIS 2018)	24.1%	63.5%	16.2%	98.1%
	Systems: Organising the system				
	Policy lever 5: Governance				
34	***Percentage of decisions taken at each level of government in public lower secondary education, 2017 (EAG 2018)***				
	Central	77.1%	23.8%	0.0%	83.3%
	State	0.0%	10.3%	0.0%	62.5%
	Regional/Sub-regional	0.0%	4.9%	0.0%	33.3%
	Local	0.0%	13.3%	0.0%	71.9%
	School	14.6%	34.0%	0.0%	91.7%
	Multiple levels	8.3%	13.8%	0.0%	100.0%
	Policy lever 6: Funding				
35	Expenditure on education as a percentage of GDP (from primary to tertiary), 2016 (EAG 2019)	5.0%	5.0%	0.0%	6.5%
36	***Annual expenditure per student by educational institutions, for all services, in equivalent USD converted using PPPs for GDP, 2016 (EAG 2019)***				
	Pre-primary education	7 451	8 349	1 579	17 533
	Primary education	7 689	8 470	2 961	17 913
	Lower secondary education	10 382	9 884	2 561	21 739
	Upper secondary education	9 628	10 368	3 001	21 231
	Tertiary education	11 014	15 556	5 787	48 407
37	***Relative proportions of public and private expenditure on educational institutions, 2016 (EAG 2019)***				
	Public sources	80.7%	82.7%	62.7%	97.6%
	All private sources (includes international sources)	19.3%	17.4%	2.4%	37.3%
38	***Change in the share of expenditure on educational institutions, EAG 2019 (Percentage-point difference between 2010 and 2016, primary to tertiary education)***				
	Public sources	-9.8	-2.7	-9.8	6.3
	All private sources	6.4	2.5	-6.3	7.0

Notes

1. The average, total, minimums and maximums refer to OECD countries except in the Survey of Adult Skills, where they refer to participating countries. For indicators 6, 13 and 17-19 the average value refers to the arithmetic mean across all OECD member countries (and Colombia), excluding Spain. For indicator 5, the average value refers to the arithmetic mean across all OECD member countries (except Japan, Korea and Poland) as calculated by the Education Policy Outlook.

2. "m": included when data is not available.

3. "NP": included if the country is not participating in the study.

4. Statistically significant values of the indicator are shown in bold (PISA only).

5. The average three year trend is the average change in PISA score points from a country's/economy's earliest participation in PISA to PISA 2018.

6. "a": included when the category is not applicable.

7. For Portugal, this refers to maximum teaching time.

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NOTES

[1] In PISA 2018, Portugal's sample did not meet the PISA standard for students' response rate: overall, 76% of the sampled students responded (the PISA standard requires a minimum of 80%). However, a non-response analysis based on data from a national mathematics assessment in the country showed that the upward bias of Portugal's overall results was likely small enough to preserve comparability over time and with other countries. Data from Portugal was therefore reported along with data from the countries/economies that met this 80% student-participation threshold. See *PISA 2018 Results (Volume I): What students know and can do* (OECD, 2019) for more information.

[2] On 25 May 2018, the OECD Council invited Colombia to become a Member. While Colombia is included in the OECD averages reported in this publication for data from Education at a Glance, the Programme for International Student Assessment and the Teaching and Learning International Survey, at the time of preparation of these OECD datasets, Colombia was in the process of completing its domestic procedures for ratification and the deposit of Colombia's instrument of accession to the OECD Convention was pending.

[3] For Portugal, this refers to maximum teaching time.

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