

having taken higher degrees abroad, and are now assuming positions of responsibility and decision making in Portuguese society.

18. Regional policy in the provision for young children demands different solutions to cope with differing needs. For example, where school numbers have fallen as their regional population ages and younger adults and their children migrate to other localities, empty primary classrooms have become available to cater for expanding pre-school provision. In more industrialised areas, educational buildings are less likely to be available, and as demand for places exceeds supply, greater capital investment in buildings is required. These intra- and inter-regional and district differences make generalisations about early childhood provision for young children in Portugal difficult.

### **Economic factors**

19. Like many industrialised nations, the economy in Portugal has different impacts on different sectors of the community. There are regional differences and there are societal differences, with distribution and access to income being more difficult for the rural, for young families and for the elderly. According to Eurostat statistics, 24% of Portuguese children are living in poverty. Portugal is not alone in facing these kinds of issues.

20. Although in 1995 the growth rate achieved by the Portuguese economy was above the European Union average, recent years have seen some decline from that position. The Portuguese annual rate of inflation from 1990 to 1996 was 7%, compared to 3% in Germany and the United Kingdom, 5% in Italy and 12% in Greece. A comparison of GNP per capita average annual growth rate 1990-96, shows Portugal increasing at 1.7%, similar in growth rate to the United Kingdom economy and more than Italy (0.9%) and Greece (1.3%) but less than Poland (3.3%). Yet, the GNP per capita in 1996 reveals much wider differences: Portugal: \$10.160; United Kingdom: \$19.600; Poland:

\$3.230; Italy: \$19.880; Greece \$11.460 and Spain: \$14.350. The Portuguese economy, over time, is growing steadily, and inflation, although higher than many of the European Union states, is within reasonable bounds, but the monetary value of its production still places it amongst the lowest in Europe outside Eastern Europe.

21. The amount spent by the Portuguese state for the years 1990-1997 on education, expressed as a percentage of the total central government expenditure, was 11%, compared with 5% respectively in the United Kingdom, 4% in Spain and 9% in Greece. Only Ireland, the Netherlands and Finland in the European Union reach the level of Portugal's recent educational investment in terms of percentage of total governmental investment. Clearly, there is committed political will in Portugal to use educational investment as a means of development and progress.

### **Employment factors**

22. Between 1993 and 1994, the unemployment rate increased significantly from 5.5% to 6.8%. In 1995, the unemployment rate was 7.1% but fell to 6.7% by 1997. These figures suggest much smaller numbers than for most of western Europe although the regional difference in 1997 (for example, Madeira, 5.2%, and the Algarve, 7.8%; Norte, 6.8% and Lisboa, 7.8%) reveal that unemployment is most widespread in the more industrialised areas. There are both higher rates of employment and higher rates of unemployment in the Lisbon and its surrounding area and in the Norte region because these are the regional areas of greatest population. But, it should be noted that, given the likely hidden economy in Portugal, statistics on employment and income and a number of other issues need to be treated cautiously.

23. From 1993 to 1997 the percentage of those employed in the agricultural sector increased from 11.6% to 13.6% as a proportion of the total of those employed. The figures for the industrial sector

show a decrease from 32.8 % to 31.3% and in the service sector from 55.6% to 55.1%. Again, these national figures conceal large regional differences. The Lisbon area and the Algarve have the greatest proportion of service sector workers, the Norte region has the greatest proportion of industrial employment and the Centro region has the greatest proportion of agricultural workers. More than 4.5 million were employed in 1997, the greatest numbers in employment were in the Norte and in the Lisbon area.

**Table 1. Activity rate, by sex and age group, 1998**

Age Group	Male %	Female %
15 - 24	50.7	44.5
25 - 34	92.9	80.5
35 - 44	95.3	77.3
45 - 54	91.0	65.8
55 e superior	42.5	23.3
Total	57.0	43.6

Source: Portugal Background Report, 1999

24. In 1997, the United Nations Population Division data indicated that 37% of the Portuguese population was urbanised. A comparison with urbanisation in Greece 60%, France 75%, Spain 77%, and the United Kingdom 89% suggests that in this respect Portugal is more rural than most of the rest of Western Europe, although in some Portuguese communities, for example, in the Northwest, a mixed economy operates with many people retaining their traditional small property whilst also having some kind of paid employment. From 1970 to 1990, the average annual growth rate of the urban population in Portugal was 1.7%. Since 1990, it has been 1.2%, indicating that although the process of urbanisation is slowing, numbers in urban areas are still increasing. The Portuguese urbanisation rate is seen to be more sustained, over time, when compared to the Mediterranean countries of Spain (1.4% in 1970 falling to 0.4% in 1990); Italy (0.5% falling to 0.1%) and Greece (1.3% falling to 0.6%) (UNICEF, 1999).

25. Urbanisation impacts the development of ECEC in a number of ways. Perhaps most importantly, increasing urbanisation correlates with greater employment opportunities for women. As Table 1 shows, female employment rates are high: 44.5% for women as a group, but for women aged between 25 and 44, a period when most women will be raising families, the employment rate is 79%. Given this reality, families' need for support in addressing provision for young children is likely to remain strong in the coming years. On the other hand, as migration to the cities increases, rural areas, with sparse (and decreasing) populations, are faced with other challenges. Either they provide transportation to take children to centralised early childhood settings or they need to sustain many smaller and often less economical centres. In some rural areas, more than 90% of pre-schools have only one educator.

### **Social factors**

26. Social and political changes, especially since the 1973 Education Systems Reforms, have impacted pre-school education significantly. After the 25 April 1974 revolution, huge efforts were put into the democratisation of education. The issues of universal access, quality, and affordability were present in efforts to assure at least nine years of compulsory education for all citizens and to eradicate the high illiteracy rate, particularly prevalent among the ageing population and among women. In addition, the last two decades have shown first an increase and then a decrease in emigration but at the same time a consistent pattern of migration by young families with children to the coastal regions in search of work and better living conditions. Urbanisation has increased, bringing with it familiar patterns of exclusion, youth crime, changing values, and a raft of economic and social pressures within the cities. In rural areas, the ageing population has meant that children are more likely to grow up isolated from other youngsters. In light of these social changes, the Ministry of

Education and the Ministry of Labour and Solidarity have recognised the need to provide more places for young children whose traditional carers and educators, in both urban and rural areas, are now more likely to be in paid employment. Concern about high rates of school failure has resulted in further policy attention to the role of early childhood services as a means of providing all children - and in particular those from disadvantaged backgrounds - with a fair start in life. Thus, early childhood provision in Portugal is viewed as an important tool to promote socialisation and social integration among diverse socio-cultural groups, fostering respect for cultural diversity, and facilitating awareness of children's roles as members of society. All these changes have impacted the interface between the state, the world of the family and the world of work, and the place of women and children in society - particularly in the last six to seven years.

### **Equality of opportunity for women**

27. Throughout the 20<sup>th</sup> century, and particularly during the 1960s, Portuguese women have made huge strides in gaining equality of opportunity and status, through greater access to education and the labour market. The subsequent arrival of democracy reinforced notions of equality; women's rights are explicitly protected within the 1976 Constitution, and recent legislation (1997 Constitution, article 59) foresees the conciliation between family and professional life. Women's achievement at university level has been dramatic. In 1997, women represented 59.7% of all graduates under the age of 30 years of age. There are some small gender differences in the subjects chosen to be studied at initial graduate level, but it is interesting that gender stereotyping is confronted in data on PhD choice. Between 1960 and 1990, 42% of PhD students in Exact and Natural Sciences were women and only 29.9% in Social and Human Sciences. There is less evidence of achievement by women

outside the university sector, and, as in most developed countries, there is still evidence of men with similar qualifications earning higher salaries than women and covert ceilings at the highest levels to women's promotion. Although while female labour force participation rates are high, average earnings remain the lowest in the European Union (EC Childcare Network, 1996).

28. Along with this educational achievement, women have gained greater access to the labour market in recent years. It is important to note that unlike many other European countries, mothers with young children in Portugal tend to work full-time. In 1993, 63% of mothers with young children worked more than 20 hours a week - the highest proportion of full-time employed mothers in the European Union (EC Childcare Network, 1996). One consequence of this trend is that there is a large parental demand for early childhood arrangements with long opening hours to accommodate the schedules of full-time working parents. A second consequence is that as a woman's economic and social status improve, they face even greater pressures to reconcile work and family responsibilities.

29. Despite the progress attained in the spheres of education and employment, women are still viewed as the main link for children between home and pre-school. There remains a cultural perception, even amongst women themselves, that a mother's primary role should be to care for her children and family, particularly for infants and toddlers. Perhaps because of this societal perspective, there is a significant lack of centre-based services for children between birth and three years of age. Men are generally viewed as financial providers not carers and educators and, though there have been attempts by the Commission for Equality and the Family to address the issue through the media, there is not parity in sharing the responsibilities and demands in family life. There are virtually no men involved in the professional care or education of young children, reinforcing these traditional division of gender roles.

## Government and decentralisation

30. Administratively, continental Portugal is divided into 18 districts incorporating 275 *concelhos* (municipalities) composed of more than 4.000 *freguesias* (parishes). Many public administrative bodies including health, education and finance operate at a district level. Many of the public records are gathered at the parishes level. Statistically, data is often presented as collated by region. There are five de-concentrated planning regions delineated by the government which, with the exception of Lisbon, run across the country from the western seaboard to the mountainous eastern boundary with Spain. These are not yet administrative regions because in a recent referendum, regionalism was rejected. This had implications for European Union regional funding which now tends to go towards the municipalities.

31. The government appears to have a centralised approach in the conception, regulation, evaluation and global co-ordination of its policies but, perhaps for sound economic reasons, ministerial departments now favour decentralisation. Results from a recent government initiated referendum on the issue of creating more autonomy and administrative control for the currently powerless continental planning regions, to create a level of independence similar to that which is already enjoyed by the Regional Autonomous archipelagos of Açores and Madeira, indicated that there was less desire for a federalised system than had been generally thought. Nevertheless, the government recognises that a substantial element of decentralisation is necessary given the wide disparity of conditions in the regions and that policies have to be adjusted to encompass local conditions. Yet some senior decision-makers reported to the team that they felt demarcation, at every level of the ECEC system, was still a major issue impeding collaboration of services at local level. Respecting another's territory, it was suggested, was endemic in Portuguese society and, traditionally, Portugal had been a very centralised country, especially under the dictatorship which also had encouraged demarcation. Local communities, little by little, were getting more power but there were continuing difficulties in implementation and co-ordination.

32. Power in decision making in Portugal is not only being devolved to the municipalities. Within the ECEC sector, power is also devolved to various other authorities. Within the umbrella of the **Programa para a Expansão e Desenvolvimento da Educação Pré-escolar** (Programme for the Expansion and Development of Pre-School Education), the two lead ministries, the Ministry of Education and the Ministry of Labour and Solidarity, acknowledge several privileged partners. These privileged partners - national bodies working at local level - are the *Associação Nacional dos Municípios Portugueses* (National Association of Portuguese Municipalities), the *União das Instituições Particulares de Solidariedade Social* (UIPSS or Union of Social Solidarity Institutions), the *Misericórdias* (Charitable organisations with a special status) and the *Mutualidades* (Mutual Trusts). Some are local government agencies, some are private non-profit organisations linked to the church or to charities. Their roles will be explored in greater detail later.

## Family policy

33. The Portuguese Constitution follows the United Nations' Convention on the Rights of Child by safeguarding the balanced development of the nation's children and by giving them the right to enjoy protection from the state and society against abandonment, abuse, discrimination and oppression. Portugal was one of the first countries, in 1990, to ratify the United Nations' Convention on the Rights of the Child. The High Commissioner for Equality and the Family co-ordinates the implementation of the UN Convention. Representatives of all ministries (Education, Solidarity, Justice, Health, etc.) and other civil society organisations are active participants and recently prepared evaluation reports on the implementation of the UN Convention in Portugal. The Portuguese State gives special protection to orphans and all those who are deprived of a normal family environment. Normal is defined through a framework set out in legislation which sets norms concerning the family, fatherhood and motherhood, and highlights special responsibilities towards children



whose safety, health and moral and educational development are at risk. The guiding principles of the Portuguese legislation (including the penal code and civil law), are:

- non-discrimination;
- the interests of the child are paramount and safeguarded;
- the right to life, survival and development;
- respect for the opinion of the child.

34. The Ministry of Labour and Solidarity is the lead ministry for policy in this area, although the Ministry of Education also gives financial support through such interventions as supporting the costs of school meals and other educational charges for those whose parents are receiving social security benefits. The Ministry of Education also meets the costs of those who require additional facilities or support to address their special needs.

35. Monthly family allowances have been universal since 1997. Families with children under 12 months or families with one or two children receive lower benefits than those whose children are older. Those with two or more children or whose children have special needs have an increased allowance. Family allowance structures were revised in 1997 (see Table 2).

**Table 2. Family Allowances, 1999**

Income Band	Children up to 12 months of age in families with 1-2 children	Children up to 12 months of age in families with more than 2 children	Children over 12 months of age in families with 1-2 children	Children over 12 months of age in families with more than 2 children
Level 1	14 730\$	22 100\$	4 420\$	6 630\$
Level 2	11 450\$	5 400\$	3 070\$	4 170\$
Level 3	7 450\$	9 690\$	2 840\$	3 690\$

Source: Portugal Background Report, 1999

36. There is also a **Programa do Rendimento Mínimo Garantido** (Guaranteed Minimum Income Programme), a priority measure fully implemented since 1997, to reduce social exclusion and societal drop-out and to promote social welfare and regeneration. This programme also aims to restore autonomy to the family. It is implemented through the state, the Social Solidarity Institutions (IPSS), and local government. The Guaranteed Minimum Income Programme requires adults to enrol in education and training programmes in order to equip them with the skills that allow them to join the work force or to become self-employed. It also requires the children of participating parents to attend a pre-school, evidence of the high priority that the state is now placing on pre-school provision as a means of addressing issues of social exclusion.

37. In 1995, the Ministry of Labour and Solidarity established the **Programa Ser Criança** (Being a Child Programme), to facilitate the balanced development of children and the improvement of parental competence, to promote family and social integration and self-image, and to improve systematic detection of children at-risk or with special needs. At municipal level, there are the **Comissão de Proteção de Menores** (Commission for the Protection of Minors), composed of childhood professionals from diverse backgrounds, and officials from the Ministry of Justice, who intervene in situations to protect children's rights or offer child protection. Parents may appeal against their ruling to the *Tribunal de Menores e de Família* (Family and Minors Tribunal). There is sometimes a conflict between the principle of autonomy of the family, the rights of the child and the state's role as protector. Traditionally, conflicts of this nature have tended to have been settled in favour of the family.

38. As the Background Report makes clear, the integration of services for young children and families continues to be difficult, given the multiplicity of agencies and the variety of initiatives. To combat this another set of authorities was established. The **Programa Nacional de Acção** (National Programme for Action), introduced in 1990, was

intended to co-ordinate all welfare initiatives and achieve greater articulation. The **Alto Comissário para a Igualdade e Família** (High Commissioner for Equality and Family) was set up as a national structure to co-ordinate private and public sector services working in areas of equality and family. The **Conselho Nacional da Família** (National Council for the Family), the **Comissão Nacional dos Direitos da Criança** (National Commission for the Rights of the Child) and the **Comissão Nacional de Crianças e Jovens em Risco** (National Commission for Protection of Children and Young People at Risk) have monitoring roles according to their different foci in following up legislation. The **Comissão Nacional dos Direitos da Criança** already has requested the gathering of statistical data and information about the situation of the children.

## Health policy

39. Since the mid-seventies, Portugal has seen impressive changes in the health of the nation and in health policy implementation, especially in relation to mothers and their children. Infant mortality rates continue to fall although, understandably, this fall has become less dramatic as rates come into line with other European Union countries. Statistical analysis suggests that new issues emerge because previous ones are addressed. For example, because more children survive infancy, chronic and genetic illnesses in adolescence are increasing. Many young children still suffer but this can increasingly be seen as being related to their physical and social environment, and health data emphasise the correlation with socio-economic background.

40. Some school health care is provided by qualified staff teams who visit schools and who are employed by the Regional Health Administration. This screening programme, *Programa de Saúde Escolar* (Programme for Public Health), is available at all school

levels, and includes children, teachers and parents. The programme addresses issues such as healthy life style, informed decision making, integration of special needs, parental drug addiction, and safety. Other programmes link these teams with partnerships, reaching out into communities and targeting specific health issues such as oral hygiene or health education promotion.

41. The data for school health suggest that referral rates for children during the first cycle of basic education (6-10 years of age) are significantly higher than for the birth to six age group. Following recent statutory intervention, there have been significant advances in "special educational needs" (SEN) identification. In 1999, early intervention increased 25% among 0 to 3 year olds and 19% among 3 to 6 years old.



## Chapter III

### Overview of ECEC in Portugal

42. Over the past four years, the national government has led a massive effort to co-ordinate and expand the diverse forms of pre-school provision for young children, with particular attention to the quality of its educational aspects. The government has brought together a wide range of stakeholders - many of whom had worked more independently in the past - to improve the supply and quality of early childhood services within a coherent and regulated system. In order to better understand the substantial progress that has been achieved in recent years, and the challenges that remain, this chapter traces the historical developments leading to ECEC policy and practice in Portugal today.

#### Historical developments

43. Portugal has a relatively long history of provision for young children, although coverage remained extremely low until recent decades. Toward the end of the 19th century, several kindergartens were established, inspired by Friedrich Froebel's centenary (Oberhuemer and Ulich, 1997). The *Jardins Escola João de Deus* (kindergartens named after its founder, a Portuguese poet and educational reformer) were another private network for 4-7 year olds, while the social needs of infants and families under pressure were addressed from the beginning of this century by such charitable bodies as the *Sociedade das Casas de Asilo de Infância Desvalida* (Society of the Shelters for Needy Children). They began during the monarchy in 1910 but were closely associated with the Republican Movement.

44. With the dissolution of the monarchy in 1910, pre-school was included in the state educational system for the first time. By 1919, it had become an integral part of state primary education but because of pressures on space in school buildings, was restricted to 4-7 year olds. Even so, when Salazar came to power in 1926, only 1% of children were in pre-school education. In 1937, pre-school as part of the education system was abolished on the grounds that numbers did not justify expense and that mothers should stay at home with their children. The responsibility for supporting mothers of young children was transferred to *Obra Social das Mães pela Educação Nacional* (Social Work of Mothers for National Education).

45. By 1970, two developmental lines had emerged: one was charitable and run by social support networks such as the *Misericórdias*; the other was private for-profit and under the supervision of the Inspectorate for Education. The Ministry of Health and Assistance also had a small role in providing care for parents at work or temporary support for families under pressure or in traumatic situations. In the 1960s, family *creche* schemes and childminding services were set up to provide some minimal cover for working parents with very young children. Pre-school was reintegrated into the national education system, under the Ministry of Education, in 1973. It was only in 1974, after the *coup d'état*, that the law gave the responsibility of running the public sector to the Ministry of Education. In addition, the Ministry, in co-operation with the Inspector General for Education, was given responsibility for providing pedagogical support to all private, profit making or co-operative pre-schools. In 1978, the Ministry began setting up its own public network of pre-schools and between 1978 and 1988 (Bairrão et al., 1989), public pre-school provision increased twenty-fold, albeit from a very low base, whilst private provision increased by about one-fifth. However, as the Background Report suggests, attempts to improve the quality rather than

simply expand the quantity of public or private early childhood provision were less effective, and had a lower priority until the 1990.

### **Responsibility for ECEC and decentralisation**

46. Today, ECEC policy and its co-ordination rests with the Ministry of Education, which looks for integrated action and efficacy. The different partners who work with the Ministry of Education have defined statutory roles.

47. The central administration of the Ministry of Education funds and is responsible for:

- setting up a public *jardim de infância* (pre-school) network extending provision according to needs;
- supporting the setting up of pre-school education settings through private initiatives where public provision is inadequate;
- defining the normative aspects of pre-school education: organisation, hours of operation, pedagogical and technical aspects, evaluation and monitoring.

48. The Ministry of Labour and Solidarity funds and is responsible for:

- ensuring family support through social educational activities;
- contributing to the objectives of pre-school provision as defined by the *Framework Law*, especially in relation to minimising the absence of family;
- providing meals where necessary;
- giving integral family support services;
- obtaining suitably qualified staff to develop the family support component and to contribute to in-service training.

49. Central Administration also supports financially the other partners in the field of pre-school education, that is the already cited,



*National Association of Portuguese Municipalities*, the *Solidarity Institutions* (IPSS), the *Misericórdias* and *Mutualidades*. Attempts to standardise such issues as salaries and terms and conditions of staff, curriculum and inspection in these different organisations are causing some tensions (see Chapter 4).

50. Although policy is conceptualised, defined, planned, co-ordinated, inspected and evaluated at national level, de-concentration, if not full decentralisation, in continental Portugal is achieved through the *Direcções Regionais de Educação* (DRE or Regional Office of Education) which integrate the *Centros de Área Educativa* (CAE or Education Area Centres) at the district level. Within the Labour and Solidarity sector, this decentralisation is achieved through the *Centros Regionais de Segurança Social* (CRSS or Regional Social Security Centres) and their sub-regional services. Similarly, for the Ministry of Health, there are regional health directorates and health centres. The DRE give co-ordination and support to the educational settings and manage resources, human, material and financial. The CRSS support the social aspects of the child with educational contexts. They organise and accept financial responsibility for meals, transport and extra-curricula extended opening hours, and also co-ordinate and give technical and financial support to the IPSS. Municipalities are responsible for the buildings and for researching the materials and consumables up to the beginning of primary education at six years of age. Table 3 sets out the administrative levels, the providers and the various types of ECEC. Different forms of provision are described in more detail below.

Table 3. Forms of ECEC Provision

Administrative type	Public			Private			
Administrative level	Central		Local	Min. of Labor & Solidarity	Ministry of Education		Private firms
Administrative responsibility	Min. of Ed.	Min. of L&S	Municipality	IPSS	Non-profit	Co-operative Associations	Private firms
Types of settings							
Creche		•	•	•	•	•	•
Creche with jardim de infância		•		•			
Amas		•					
Mini-creche				•			
Family creche		•		•			
Jardim de infância	•	•	•	•	•	•	•
Itinerant provision	•					•	
Children's community centres	•					•	
ATL/out-of-school provision		•	•	•	•	•	•

Source: Based on Portugal Background Report, 1999

### Recent developments (1995-1999)

51. In 1996, a new government began the **Programme for the Expansion and Development of Pre-school Education** led by the Ministry of Education in partnership with the Ministry of Labour and Solidarity and the Ministry of Equipment, Planning and Land Administration. The main aim was to co-ordinate all provision within the public and private sectors, and to expand provision. The 1997 *Framework Law* set out operational regulations incorporating educational and care components, but putting increasing emphasis on the educational development of children (Vasconcelos, 1997, Ministry of Education, 1998).

52. The *Framework Law* therefore represents the beginning of Portugal's intention to co-ordinate its hitherto diverse and varied provision for its youngest children and included for the first time the three to six year olds within the definition of Basic Education. It also defines pre-school education as:

“...the first step in basic education seen as part of life-long education and (complementing) the education provided by the family, with which it should establish close co-operation, fostering the education and balanced development of the child, with a view to his/her full integration in society as an autonomous, free and co-operative individual.”(Framework Law, article 2 in Ministry of Education, 1999).

53. The 1996 expansion programme proposes:

- an expansion and development of pre-school provision in co-ordination with local government, private and social welfare institutions, with central government assuming a guiding and regulatory role and the pre-school budget doubled;
- the establishment of contract-based programmes with municipalities and private entities leading to the expansion and development of pre-school education;
- the adoption of an organisational model within the public network leading to the expansion of pre-school education, in close co-operation with the basic education school cycles;
- the establishment of a real partnership between the state and civil society through the development of initiatives agreed with all parties concerned;
- the promotion of pre-school education as one of the units leading to the development of an education society, involving children, parents, professionals and society in general.

54. The regulation and supervision of all pre-school settings in 1996 became the responsibility of the **Gabinete para a Expansão e Desenvolvimento da Educação Pré-escolar** (Bureau for the Expansion

and Development of Pre-school Education). The Bureau had representatives from different departments of the Ministry of Education and the Ministry of Labour and Solidarity and was advised by an Advisory Board (with representatives from municipalities, private profit/non-profit organisations, and researchers). It was co-ordinated by the Director of Basic Education under the Secretary of State for Education and Innovation. During its three-year tenure, the Bureau worked toward the aim of promoting both the expansion and the improvement of the Portuguese pre-school programme. At times the Bureau ran into difficulties in achieving consensus among its members who represented a wide range of perspectives and interests. In addition, the Bureau found it challenging to address administrative issues concerning pre-school education, in part, because it was not formally linked to the Secretary of State for School Administration.

55. Responsibilities of the two Ministries are shared with Education ensuring pedagogical quality and an orientation towards development of the child, and Labour and Solidarity orientated towards support for families and extended day cover, including such things as offering extra curricular activities. Each Ministry funds its own area of responsibility and participates in joint monitoring and inspection. There have been attempts in recent years to address the issue of articulation, and since 1997, definition and co-ordination of educational policy (for 3-6 year olds) has rested with the Ministry of Education. At the same time there has been a move towards decentralisation and the Regional Directorates of Education and the Social Security Regional Centres of the Ministry of Labour and Solidarity have assumed greater roles in the implementation of national policy in their regions.

### **Current ECEC provision**

56. Responsibility for provision for birth to three-year-olds rests with the Ministry for Labour and Solidarity who collaborates and provides funds for a number of allied bodies. Pre-school education in Portugal is legally defined as the education of children from 3 to 6 years of age and therefore has a different meaning than in most European countries where the term is usually applied to all settings for young children from birth to the beginning of compulsory

schooling. As mentioned above, responsibility for three to six year olds is shared by the two main ministries. For all children in Portugal reaching the age of six by 15 September, enrolment in the first year of the first cycle of *Ensino Básico* (Basic Education<sup>2</sup>) marks the beginning of universal, free, compulsory education. The structure of the ECEC System in Portugal for children 0-6 years of age is summarised in Table 4.

**Table 4. Type of Settings for Children aged 3 months - 10 years**

Type of Setting	Age Range	Responsible Authority
<b>3 months to 3 years</b>		Min. of Labour & Solidarity
Creche	3 months to 3 years	
Creche in jardim de infância	3 months to 3 years	
Amas/Nannies	3 months to 3 years	
Mini-creche	3 months to 3 years	
Creche familiar	3 months to 3 years	
<b>Pre-school 3-6 years</b>		Min. Ed. & Min. L&S
Jardim de infância	3 years to 6 years	
Children's community centres	3 years to 6 years	
Itinerant provision	3 years to 6 years	
<b>Ensino Básico</b>		Min. of Education
First Cycle	6 years to 10 years	
ATL/out-of-school provision	6 years to 10 years	Min. Ed. & Min. L&S or municipalities

Source: Portugal Background Report, 1999

### From 3 to 6 year old children

57. Pre-school provision in Portugal is uniquely defined, by statute, as involving the education of children from three until six years of age. It has many forms

<sup>2</sup> Basic Education in Portugal includes: Pre-School + 1st cycle (4 years) + 2nd cycle (2 years) + 3rd cycle (3 years)

and has many organisational dimensions including: public and private, non-profit making and profit making, nationally and regionally directed, secular and religious orientation, and voluntary, charitable, co-operative and statutory foundation, and differing combinations of all of these.

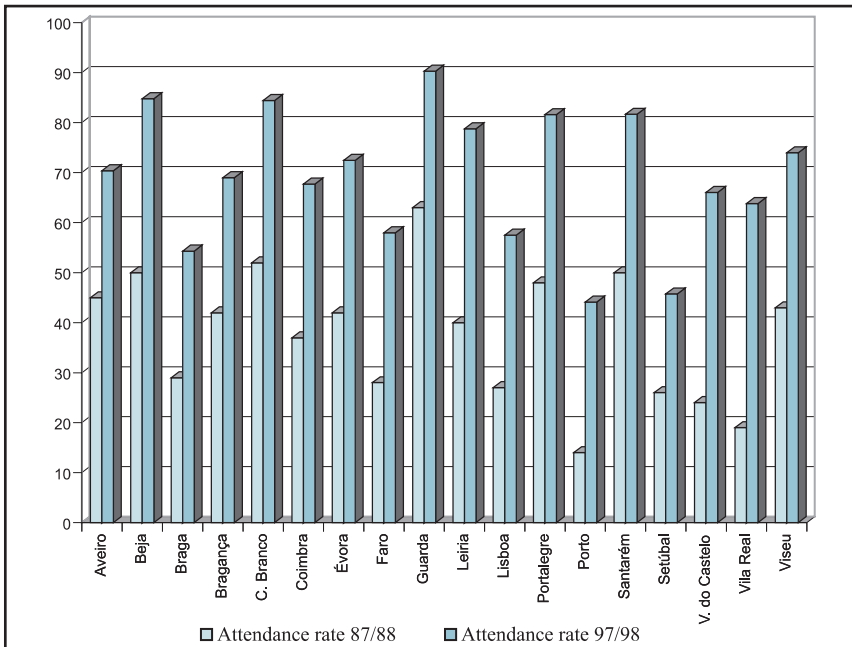
58. A setting type may, in reality, cover a wide range of different provision. As Formosinho (1996) points out, the *jardim de infância* is a generic term used as well to cover both educational- and care-oriented settings. Within the care contexts, in particular, there is great variety and the quality of service is heterogeneous. For example, a *jardim* may rely for support on a very large, relatively rich, lottery-funded charity, or it may be attached to a factory, or it may be established by a small, relatively impoverished village parish. The systems of appraisal and development of quality in these settings will also be variable. The developmental experiences for children in one centre may be very different from children's experience in a similarly named setting elsewhere. In short, a named setting type is no guarantee of homogeneity of experience or quality.

### **Jardim de infância**

59. *Jardins de infância* are the most common form of pre-school for 3-6 year old children. They can be privately or publicly administered. Opening hours are generally the same in both administrations but they can vary according to local circumstances and needs. Every year parents must be consulted and agree on the opening hours. All *jardim de infância* must dedicate five hours a day to educational activity in accordance with the Ministry of Education's national curriculum guidelines (see Ministry of Education, 1998). Only the public sector requires no fees from parents. For a number of reasons, but especially because of migration from rural to urban areas, there are in some localities many settings without full numbers of children, and, in other localities, many children without access to a place in a setting. Female employment, social need and the population of 3-6 year olds in an area are the main criteria for government choice of where expansion of *jardins de infância* should take place. Some *jardins de infância* have extended periods of socio-educational activities including, in some cases, provision of school meals.

60. Enrolment into formal pre-school settings in Portugal was amongst the lowest in Europe, though expansion of coverage has rapidly increased in the past five to ten years (see Table 5). In 1997, pre-school provision covered 64.5% of children residing in continental Portugal. The Pre-School Education Expansion and Development Plan has the goal of extending provision to 90% of 5 year olds, 75% of 4 year olds and 60% of 3 year olds by the end of 1999. This objective involves the building and conversion of a substantial number of activity rooms. Within the private sector, the majority of these settings tend to be care-orientated, while within the state sector, the majority are education-orientated. However, both types can be found within the state and within the private sectors. The state, as an expanding provider of early childhood services, is leading the drive to introduce not only more provision but to make its focus more educational.

**Table 5. Evolution of pre-school education attendance rate, per district, 1987/88 to 1997/98**



Source: Portugal Background Report, 1999

## Curriculum models in the jardins de infância

61. Traditionally, there was a clear distinction between the activities of the education-orientated settings and the care-orientated settings, both of which are called *jardins de infância*. Recently, the Portuguese Government has sought to increase the educational aspects of all jardins de infância. National Curriculum Guidelines for Pre-school Education have been legally established which are requiring the *jardins de infância*, whether organised by the Ministry of Education or the Ministry of Labour and Solidarity, to address educational issues. The development of the *Curriculum Guidelines* by the Ministry of Education suggests that the state is keen to accept responsibility for raising the quality of provision in early childhood settings. The process of its introduction involved discussions with many institutional partners and other stakeholders including parents, providers, initial teacher trainers, and study groups. This process resulted in the preparation and revision of three drafts of the guidelines, indicating that this was a grounded and inclusive process. The guidelines are not a programme but a set of principles which offer a common reference point for teachers organising the educational element in the diverse range of Portuguese settings.

62. Within individual programmes, many pedagogical models are found including: the strongly traditional João de Deus model focused on reading, writing and literature; the *Movimento de Escola Moderna* (MEM or Modern School Movement), a constructivist model created in 1966 and based on the works of Freinet and Vygotsky. In the early 1980s, the Setúbal School of Education introduced and adapted the High Scope model from the United States. This model has been expanded in the last few years through the work of the University of Minho at Braga.



## Itinerant child education

63. The minimum number of children required for the setting up of a *jardim de infância* is fifteen. Where numbers of 3-6 year olds in a locality is lower than this, especially in rural areas, the Ministry of Education may establish an itinerant child education service. Usually, these pre-schools are open part-day and organised by one educated pre-school teacher who may travel across the area on a given day to work in several different itinerant settings. For children living in rural environments, these pre-schools provide valuable opportunities to promote their educational and social development.

## Socio-educational activities (ATL)

64. The Ministry of Labour and Solidarity is responsible for supplementing educational contexts for the 3, 4 and 5 year olds by providing security, activities and occupation for children until parents finish work. These socio-educational activities - also referred to as **Actividades de Tempos Livres** or ATL - are often organised by voluntary associations attached to IPSS (the Solidarity Institutions). The ATL activities also are available to elementary school age children.

## Children's community centres (CAIC)

65. Five year old children who live in highly populated and/or deprived areas and lack access to cultural and educational facilities may experience these kinds of activities through buildings made available by the local community and professional staff placed by the Ministry of Education. This arrangement is temporary, until a new school becomes available for the children served in the CAIC.

## Provision for infants and toddlers

66. The provision of services for children under the age of three in Portugal is not as well developed as those for children who are within the three to six age range. In addition, accurate, up to date information is less available. Indeed, some participants suggest that data on the provision and uptake of care for 0-3 year olds of working parents is almost completely lacking. Formosinho (1996) suggests that a residual societal perception remains from earlier times when it was considered that all early childhood education is a private affair which concerns only the family. The younger the child, the stronger that perception holds. Since the revolution, growth in the care and education of birth to three year olds has been, therefore, relatively slow, despite the greater political visibility of social issues.

67. However, increased industrialisation and migration from rural areas have caused many young families to move away from the extended family and their traditional caregivers. Bairrão calls his country profile title of Portugal in the IEA Pre-primary Study, (Olmsted & Weikart, 1995), *Kindergartens and Grandmothers* but this image is beginning to change. Urbanisation has stimulated a need for both birth-to-three and pre-school education and care, but provision for the younger age group lags far behind. In urban areas, in particular, provision for infants and toddlers has not kept pace with the needs of young families. On the other hand, the numbers of lone parent families, although increasing, has not reached the endemic proportions of most northern European states. The overwhelming majority of Portuguese children are raised by both their biological parents sharing income and child-rearing, albeit, mostly along gender stereotypical lines.

68. Portugal has introduced a policy of full-pay, maternal leave for three months, which is soon to be extended to four months. Strictly speaking, this leave is available to the father but in practice, it is taken only by mothers. Both informal and organised (generally centre-based) provision therefore starts when the child is three months rather than from birth. Most children are placed in informal, non-

centre-based settings, based on agreements between family, friends, neighbours, in-house daily help, baby sitters and unlicensed nannies. These informal situations are coming under increased pressure as more women, including grandmothers, are taken into the work force.

69. Formal, organised care, as we have noted above, is insufficient, particularly in urban areas. In addition, it tends to be very heterogeneous, with a focus on care rather than educational stimulation. Parents also see it as primarily a care service, and the role of private, non-governmental and voluntary agencies in providing such settings is substantial. Responsibility for regulation comes under the auspices of the Minister of Labour and Solidarity. The Ministry of Education has no involvement for this age group, and there is no educational or curriculum framework to guide provision.

70. The range of different kinds of formal settings for the birth to three age group is listed below with a short explanation of each.

- *Amas* or nannies are independent helpers who are paid to look after one or more children, to whom they are not related by blood or affinity, during a parent's working hours or some other agreed fixed period.
- *Creches* provide daily care and educational experiences for children from 3 months, during a parent's working hours. They are normally open from 4 up to 11 hours daily, five days a week. Qualified professionals in the *creches* are pre-school teachers (*educadora de infância*), whose training is described below. Assistants to the pre-school teachers have no formal qualification aside from the completion of compulsory schooling, and perhaps an introductory course. Adult/child ratios in *creches* depend on the age of the child:
  - 3 months to walking age: maximum of 8 children to 1 pre-school teacher and 1 assistant;

- walking age to 2 years: maximum of 10 children to 1 pre-school teacher and 1 assistant;
  - 2 years to 3 years: maximum of 15 children to 1 pre-school teacher and 1 assistant.
- *Creches familiares* are locally organised groups of nannies, with a group size between 12-20, who reside in a particular geographical area and use their homes to offer small centre-based care to small numbers of children, usually less than four. The Social Security Regional Centres give them training and financial support, by important charities such as the *Santa Casa da Misericórdia de Lisboa* (Lisbon Holy House of Charity) or other Social Solidarity institutions. The nannies work from 4 to 11 hours daily and may have access to a supporting supervisor.
  - *Mini creches* are small contexts providing family-like environments.
  - *Creches in jardins de infância*: some pre-schools for three to six year olds, have *creches* included within their buildings, which offer care facilities for younger children between the ages of three months and three years.

### Staffing in ECEC

71. All *jardins de infância* are staffed by fully trained and licensed pre-school teachers called *educadores de infância*. *Educadores de infância* are also qualified to work in *creches*, ATL, other socio-educative settings. They have the same level of training, qualification and professional status as other teachers. All Portuguese teachers, including pre-school teachers, are educated in higher education courses in both universities and *Escolas Superiores de Educação* (Schools of Higher Education). Since 1998/99, pre-school teachers are

required to complete a *Licenciatura* (four years of higher education). This is a recent phenomenon, pre-school teacher education courses having started only in the early 1970 and university courses in the late 1970. Presently, pre-school teachers who have completed the four-year degree receive the same beginning salaries as other teachers who have completed the same level of training.

72. Some institutions offer an excellent and thorough grounding in early childhood curricula and teaching methods. Currently, there are only six public universities that offer specialised courses in pre-school education, but nationally there are 27 institutions (16 public and 11 private) offering courses with combined primary/pre-school focus. There is a particular lack of training related to the birth to three age phase, even though some *educadoras de infância* are expected to work with infants and toddlers in *creche* settings after they graduate. Those institutions which do offer specialised early childhood courses, produce their own pre-school courses. There may be wide variations in content, although child development is always included in the curriculum.

73. All types of pre-school settings, even those which are care focused, have a pedagogical director who is a qualified teacher. Part of her/his brief is to co-ordinate the work of colleagues and ensure that they have professional support. This legal requirement is, however, undermined somewhat by the fact that most public sector pre-schools have just one or two teachers and, in view of that, implementation of policy can be uneven.

74. In the public pre-school network, teachers have three levels of employment status and are appointed nationally or regionally. Those with the least favourable terms and conditions and smallest percentage of the total number are the *educador(a) contratado(a)* (pre-school teacher under contract). These will usually be the younger inexperienced teachers appointed on a short-term contract to a temporary position. There are an estimated 1 500 teachers with this status, but due to the temporary nature of the positions, the numbers fluctuate. The second

group of pre-school teachers are called *educador(a) do quadro distrital de vinculação* (district pre-school teacher). They have longer contracts than the *contratado(a)* teacher but are appointed to a district and can be moved within the district as required. There are 3 298 district pre-school teachers. The most attractive level of employment for pre-school teachers described as "effective teachers," are *Educador(a) do Quadro Único*. There are 4 500 of these teachers, who have permanent, stable contracts and are located in a stipulated, fixed setting.

75. The advantages to administrators of being able to move the majority of the work force at will is obvious but researchers have voiced serious misgivings. For the teachers themselves, competing to obtain the next level while remaining geographically mobile, the system could be viewed as discriminatory, particularly for those teachers with young children of their own. The policy of the teachers' unions has been to keep the appointments of teachers centralised by the state so that they only have one partner with whom to negotiate; the government has favoured decentralisation of this process.

76. Some teachers in the public sector work part-time elsewhere to extend their working day. Pay levels in the public sector have tended to be slightly higher than in the private sector, although it was suggested to the team that the private sector usually had more status. Staff working in the IPSS sector tend to have less favourable pay, working hours, and in-service training opportunities than pre-school teachers in other settings. In the past, non-licensed pre-school teachers predominated in the classrooms of many IPSS settings. However, in order for IPSS settings to receive financial help from the state, they are required to comply with the new legislation (Public Law 5/97) which requires one pre-school teacher per classroom. Currently, most IPSS settings have met this requirement.

77. Teachers in pre-primary and primary education can retire earlier than those in secondary education, because the profession is considered more stressful and demanding. It is, therefore, possible for a teacher who is appointed straight after initial training and works full-time to reach

retirement at 52 years of age, and 32 years of service. There is an unusually high level of pre-school teacher early retirement and turnover. In the private sector, this may be linked to the lack of a career structure and few opportunities for job mobility. In the public sector, there are head-teacher appointments, but they involve neither a salary increase nor a reduction in classroom hours (unless a school has four or more classes).

### Research on ECEC

78. Research in ECEC is still scarce but several Portuguese researchers have international reputations in the field. The pioneer research developed in the 1980 conducted by Bairrão and his team at the Oporto University is continuing, primarily in the key policy area of early intervention. The Lisbon School of Education has a research unit funded by the state and is developing research around curriculum, early development, and quality issues. The *Departamento da Educação Básica* has translated and adapted the Effective Early Learning (EEL) materials (developed by Centre for Research in Early Childhood at University College Worcester, UK) and is now training teacher educators throughout the country to adapt and disseminate a model of quality evaluation and improvement among early childhood professionals working in all three networks of *jardins de infância*. The University of Minho, through IEC (Institute of Child Studies), has several projects. The recently established cross-institution GEDEI association (**Grupo de Estudos para o Desenvolvimento da Educação de Infância** or Study Group for Child Education and Development) is preparing the first issue of a research journal in early childhood education that will cover children from birth to the end of the first cycle of basic education (to be released in January 2000). These and other projects will no doubt begin to build a much needed critical mass of Portuguese researchers in early childhood. The Aga Khan and the Gulbenkian Foundations have been influential in funding research in this area.

## Chapter IV

### Issues Arising from the Visit

79. Portugal has made huge strides in meeting the needs of children and families in the past four years, and there is an appreciation that the enormous progress achieved so far should be expanded in the future. As one ministerial official expressed it, "This is a beginning!" At a political level, many felt that in Portugal, the momentum of change must continue, but incrementally, through strengthening partnerships, keeping all the providers on board and avoiding antagonism between sectors. This political reality meant that insistence about rigour in systematising quality monitoring and assessment were difficult. Progressive statutes were passed and highly complex processes of negotiation would be needed to ensure that they are successfully implemented throughout the field. There was a realisation by all that it would take time to fully achieve their high aspirations and impressive policy objectives.

80. At the same time, there is real support from the base in favour of improving the sector. There is an awakening of popular consciousness regarding social rights and of the political power ordinary people now enjoy. One informed contributor suggested that this was a historically appropriate moment for change to happen in the early childhood policy area, as people, especially women, are becoming politically aware. This growth of political awareness coincides with demands for more action to meet the needs of young children and parents, as family patterns change and women's traditional role is widening to include increasing demands for them to take up employment outside the home. Although Portugal has a tradition of women being in the work force, employers have not been very concerned about child care or family-friendly policies. For a long time, ECEC was considered a women's issue, but now is becoming a public concern. Early childhood provision has thus become a central item in the political agenda at national and local level, although the issue for



most people is about *care* rather than *education*, and about practical need for child care more than equal opportunities for women or the stimulation of growing minds.

81. For government, the argument lies not just in the political realities of a popular measure but in issues related to the quality of education and the long-term development of human resources. High quality ECEC is increasingly seen as the vital foundation for lifelong learning. A spokesman stated that the Prime Minister's vision gives priority to education, and within education, the early childhood period: "We intend not simply to compare with other European nations but to be amongst the best educated." The foresight of the present government in investing heavily in education and especially in early childhood shows a strong belief in the importance of this phase of development to later success, both for the individual and for society. Compared to most other EU countries, many with more favourable economic circumstances, the goals toward which Portugal strives and the financial commitment it makes to young children are remarkable. An example of this can be seen in child/adult ratios in the typical *jardim de infância*, which are lower than in many other European countries where classrooms of more than 30 four-year-old children under the responsibility of a single teacher are not uncommon.

82. Continuing the enormous advances that the state, municipalities and non-governmental agencies have made in extending provision for young children in Portugal will take both tact and forcefulness. As the team was told on several occasions, the next level of reform will need to probe the balance between state and other agencies, consider the relationship of family to the state, and bring the local authorities more to the fore. The team recognises that already substantial progress has been made. Joint agreements have been made between Ministries and there has been substantial expansion of the services especially through decentralisation initiatives. There were some successes also in gaining agreement between groups outside the public sector about employment conditions. Scaffolding

laws, such as the 1998 approved statutory basis for administration and management will be gradually implemented until the end of 1999/2000 school year.

83. It is important to state that the issues we identify below were all referred to at some point by Portuguese colleagues during our visit and, as such, reflect what is known already. Part of our team's role, as we conceive it, is to spotlight them. Some of these involve deep cultural perspectives that cannot change overnight but may evolve, in time, incrementally. It is against this background that the reviewers offer, in a spirit of support and professional dialogue their outsiders' perceptions of the central issues which need to be faced at this time but in full awareness of the sensitivity with which such issues will need to be addressed. Our intention is to try to hold up a mirror to our Portuguese colleagues, a mirror created by our reflections on what we have seen and heard, and ask, "Is this a true reflection of where you are and is our perspective helpful?" To that end, we have identified a number of issues, which we feel require further consideration in Portugal. Although these issues are multivariate and inter-linked, for the purpose of organising the review team's analyses, we have attempted to delineate and separate them.

### **Social representations of childhood and the family**

84. Children have a special place within Portuguese society and warmth and tolerance towards children was clearly apparent, particularly in the affective interactions between staff and children in the settings we visited. As the Background Report suggests, there seems to be a "romantic and idyllic" view of childhood, and less recognition of children as rightful social actors (Background Report, p. 13). This idealised view of children, as fragile and vulnerable, can sometimes lead to an imbalance between the adult's perception of the childhood needs and the actual needs of children. While such constructs of childhood may help ensure that

children's health and safety needs are met, they also can make adults over protective and limit the child's opportunities for exploration and appropriate stimulation.

85. Our discussions with health and legal authorities suggest that at the level of policy making and within society-at-large there is a strong commitment to children's rights. Within the ministries and relevant agencies at the local level, there is consciousness of the rights of children and of the action to take in cases of abuse or maltreatment. The joint ministries who are represented in the national commission for the rights of children spent \$11.5 million on raising public awareness of children's vulnerability to family and institutional violence and have authorised a forty-second video. In addition, the Portuguese system of reporting and dealing with child abuse, as it was explained to us, meets European standards. Yet, comparative statistics on the exploitation of children, and concerns expressed by the health and legal authorities, suggest that there may be a gap between commitment to children's rights and the actual provision of youth care. Strategies to overcome these implementation barriers need to be put into place to ensure that children's rights are protected fully.

86. With regard to early childhood provision, an idealised perception of childhood seems to influence relations between the state and the family. The team members were told, on a number of occasions and from different levels of the system, that the importance of family sometimes overrides the state's intervention strategies for children. It was suggested that traditionally the state has been reluctant to become too dominant in matters that, according to some, are rightfully the concern of the family. Early childhood provision therefore is seen as an issue for women and for business and commerce, not as an issue for people and society, and still less about children's rights to self-fulfilment. Some respondents suggested that in some cases, the state appears reluctant to intervene to support parents with young children, because the family in matters of child rearing is seen to have absolute power. The Eurydice (1998) information dossier for Portugal states: "Pre-school

education is, from a formative point of view, complementary and/or supplementary to education received at home. Its attendance is not compulsory as the family's educative role for this age group [children between the ages of three and six] is recognised" (p.11).

87. This reluctance of the state to intervene in family domains seems to be particularly strong for children from birth to three years of age who, according to a number of correspondents, should be cared for by their mothers or other family members. As noted earlier, the state has no educational role or responsibility for this age group. Yet recent research confirms the primary importance of this early phase in setting attitudes and patterns of thinking such as the ability to self-organise, to persist, to realise an image of oneself as an exploratory learner making sense of one's world (Shore, 1997). These attitudes and dispositions have lifelong implications for individual development and learning. Parents need some support in stimulating their children's dispositions and attitudes to learning whether their children are cared for within the home or in organised provision. The team felt this reluctance to address state involvement in providing early childhood services for the birth to three years age group sometimes had negative consequences for families and for children, and that these would increase with expanding industrialisation and demand for women to join the workforce. One of the most serious of these consequences, already apparent, was the relatively late identification of many children with special needs or who were at-risk.

### **Family engagement**

88. The *Framework Law* emphasises the importance of active parent participation in pre-school settings. There seem to be opportunities for parental participation in decision making in Portuguese pre-schools, and the settings visited by the review team engaged parents to a greater or lesser degree, e.g. engaging them as practical helpers, bringing them into the learning process, or involving them at

institutional level in making decisions. This was particularly true of one combined, pyramid setting in a newly settled coastal township, which was a community school (pre-school through secondary school) with links to smaller neighbouring satellite primary and pre-school settings. These parents valued the care and education opportunities available for their children and the team were aware of good working relationships and the proactive stance the school took in encouraging parents to participate in decision making. Despite the importance placed on family engagement in the legislation, parents were less involved in other settings. Professional staff should be encouraged - and trained - to take a proactive role with regard to parental participation so that families are viewed as partners. This is especially important in settings for the youngest children. Given the tension that exists in some parts of Portuguese society concerning the respective responsibilities of state and family for the care and education of the young child, the promotion of increased parental involvement and participation in publicly funded settings might allow some resolution of the issue. It is encouraging that parent associations are among the privileged partners in the formulation of national educational policies, a shift that is likely to have a positive impact on family engagement in pre-schools in the coming years.

### **Quality and access**

89. As in many other countries, there has been much discussion in Portugal about what is meant by "quality" in early childhood education and care. As judgements about quality are generally made from the standpoint of a narrow group of assessors (who do not necessarily include either children or parents), some European researchers have begun to doubt that the term quality has any universal validity in a post-modern world which is concerned with legitimacy. Others, more pragmatically, have tried to frame ideas on quality as domains that stakeholders and partners in settings must negotiate.

90. Bertram and Pascal (1997) conceptualise quality in three domains: quality of context, quality of process, and quality of outcome. Contextual issues centre on such matters as: the purpose and aims of a setting; the involvement of parents; the curriculum offered; the physical environment; the range of models of adult interaction (passive or proactive, caring and stimulating); the management, monitoring and evaluative aspects; the awareness of equal opportunities; the nature of observation, planning and record keeping; staffing qualifications and ratios, and the access of staff to appropriate training; and responsiveness to needs of families. Process qualities focus on the nature of interactions: how adults both practitioners and parents "engage" with children and each other (focusing on mutuality, empowerment, giving of autonomy, appropriate stimulation and sensitivity) and the degree to which children are "involved" in the activities they are offered. Outcome qualities look at such things as: respect for self and others; dispositions to learn; emotional and physical well being; and cognitive and aesthetic development.

91. Setting-based quality domains need to be matched at the macro level by institutionalised notions of quality. The Background Report suggests that the Portuguese perspective on quality improvement include both balancing the educational and social support aspects of provision (implying, for example, the extension of opening hours and the provision of meals in the public network), and emphasising appropriate educational development, especially in the Solidarity network. From what the team saw and heard, we formed the impression that the Solidarity network was better adapted to addressing family needs and in general, addressed educational aspects less well; in the public sector, the reverse seemed to be true.

92. A key issue, then, centres on diversity and lack of homogeneity both in access to high quality provision for children and in access to the range of provision. Diversity, in itself, can be seen as strength. The needs of family and children are diverse and there should be a range of choice to meet those needs. The issue is not about the range or

variety of provision but about diversity in quality offered to families and diversity in access. Although there are many agencies working to address this latter problem, access to provision, particularly high quality provision, still depends less on need and more on location and socio-economic status. As yet, therefore, the social right to quality pre-school is not enforceable. In a country in which pre-school provision is seen as part of national policy to combat social exclusion, this issue needs to be addressed urgently.

93. Many of the issues surrounding disparities in quality and provision are linked to the multiplicity of providers and the complex division of functions between them. The system must reconcile many different interests: public and private provision; central and decentralised organisation; secular and religious control; state and non-governmental auspices; union interests and state attempts to reform and streamline. Variation also arises in terms of geographical location - whether one is speaking about child care centres in a wealthy suburb or in a disadvantaged immigrant area; about provision to the expanding coastal plain or to the deserted hinterlands; about the needs of isolated rural areas or of the pressure on supply in overcrowded urban centres. At the heart of the matter, there is the dilemma of reconciling the traditional values of the past and the social demands of a modern industrial nation.

94. The team was concerned about these disparities in provision for young children across Portugal. There is a need to consider one interviewee's comment that differential investment is necessary to achieve parity across sectors and communities and to achieve equality of opportunity. Specifically, the team felt that intervention strategies targeted at disadvantaged children could be increased and extra financial help given to those from low-income families. However, this intervention should not institutionally marginalise children, by isolating them from their more advantaged peers.

## Expansion of quality education and care provision for children from 0 to 3

95. A substantial issue which the team thought to be an essential prerequisite to the long term development and well-being of children in Portugal, was the scarcity of provision for the birth to three years age group, the inequitable access to such provision and in general, its lack of quality. Responsibility for this age group is located predominantly in Ministry of Labour and Solidarity and non-state sector. *Creches* and other settings are insufficiently monitored and where inspection does take place it usually focuses on such matters as building regulations or responds to parental complaints. The educational aspects were rarely monitored in our meetings and visits, and the opportunities for staff development in this age phase seem to be minimal. Therefore, the team was concerned that children deemed "at-risk" were more likely to be served in the *creches*, while their more advantaged counterparts had the opportunity to participate in richer early childhood experiences.

96. When we raised these issues with our Portuguese colleagues we were told that there was "a consensus that these children should be at home." Yet, as we have already discussed, the reality is that for many working families, especially those from low-income groups, access to care has become an important issue as traditional forms of family support, especially grandmothers, are more likely themselves to be in work. Research evidence points to the crucial influence of appropriate stimulation in these years to the development of lifelong attitudes to learning. Adequate provision in this area is not simply an adjunct to equal opportunities for women but a fundamentally important issue for the realisation of full potential in children and ultimately the enhancement of human resources for the nation.

97. By legally defining pre-school as beginning at three years of age and in the absence of any role for the Ministry of Education in the birth to three age group, a valuable opportunity is missed to strengthen the foundations of lifelong learning for Portuguese



youngest citizens. It was the team's understanding that this may have resulted for financial reasons and the uneasiness of committing the Ministry of Education to overseeing what can be a very expensive form of provision. Yet, this approach contrasts with trends in many other European countries notably Spain, Sweden, and the United Kingdom, where the role of the Ministries of Education for infant and toddler early childhood settings has increased in recent years. In addition, the status and training of practitioners in infant-toddler settings has been much weaker in the care sector than in the *jardim de infância*, and this may have negative consequences on the quality of the provision. In addition to reconsidering the role of the Ministry of Education for infants and toddlers, for quality reasons, the status and payment for workers needs to be examined. Incentives for staff working with infants and toddlers to raise their level of training to that of pre-school teachers and increased access to in-service training should be explored as policy options.

### **Children with health problems and special needs**

98. In recent years, there have been significant advances in identifying children with "special educational needs" (SEN) and a movement from a deficit model toward genuine integration. Nonetheless, the reviewers were concerned that identification of special needs was usually delayed until the primary stage when remediation would be much more difficult and psychological or developmental damage had already occurred. Referral rates for children six to ten years of age are significantly higher than for the birth to six, which suggests that many children are having their special needs identified too late. There is evidence that delayed intervention has profound effects on the child and is more costly in the long run to society, both in underachievement of potential, greater dependency and greater cost.

99. The place of children with special needs within the pre-school system is strongly protected in law. The policy goal in Portugal is inclusion within regular schools whenever possible, and in many settings, children with special educational needs are admirably integrated. They benefit from support by trained staff following a structured and differentiated curriculum. Yet, medical staff, with whom the team spoke, expressed their concern that the number of young children with special educational needs in private settings was excessive and not in the best interests of these children. It was suggested that sufficient funds were not made available to achieve full inclusion within the regular school system, and as a result, many children with special educational needs continue to attend private special education settings that receive state funding. Other identified barriers to successful inclusion include the insufficient supply of specialised staff in regular schools and a lack of consensus about their role, inappropriate facilities, and transport difficulties.

100. For children between birth and the age of three years, some senior health professionals suggested that in primary healthcare there existed a lack of consensus, uniformity and the acceptance of a preventive medical approach based on user-friendly interactions with the families. They felt that child abuse was significantly under reported and that government was resisting pressures from professionals to adopt precocious intervention strategies. It was suggested that relationships between hospitals and the regional centres was good but that health intervention strategies for the underprivileged often fell through the structures in place.

### **Implementation of national policy**

101. The review team acknowledges the substantial effort to expand early childhood provision through the partnership of two ministries and private institutions (IPSS, private schools, *Misericórdias*, etc.). Such an effort is especially impressive given that, like other

countries, national intervention, co-ordination and regulation by the state has occurred after patterns of responsibility have been established by other institutions in the field. Many of these institutions have learned to work in separate and independent ways to meet the needs of families and children over time - for example, catering for different regional areas or particular social economic groups. In Portugal, there are parallel administrative organisations giving different responsibilities to diverse ministries and non-government organisations and in the process, creating multiple levels of decision-making and execution. In addition, administrative regions for the health, education and social services sectors do not always have conforming boundaries and this gives rise to statistical and administrative problems.

102. As a result of these complexities and tensions, much of the admirable work at policy level is diffused and not fully implemented. A beginning has been made with the recently agreed protocol between the Ministry of Education and the Ministry of Labour and Solidarity, but there still remains much duplication and inefficiency to change. It seems as if territories, with some notable exceptions, are demarcated and guarded. Collaboration then becomes impeded and policy fragmented. Yet, there are many signs of progress. A Ministry of Education official informed us:

“We are breaking with the established routine. We are working to conciliate different interests and perspectives that have only just begun to work together. From 1995 to 1999, there was a 143% increase in the educational budget. We have backing at the highest level to drive forward inter-ministerial and inter-sectorial collaboration”.

103. Even for the Ministry of Education, the separation of functions outlined earlier can cause excessive pluralism in policy-making and problems in policy implementation. The evidence suggests that children and families are best served when structures are simplified

and when services attempt to address holistically the needs of families and their children from birth. In addition, it helps when one organisation or Ministry takes the lead role and has the responsibility and power to make sure decisions are implemented (Iglesias, 1999). There is a need therefore to consider alternative management structures and the future role of the Ministry of Education in the whole early childhood field in Portugal.<sup>3</sup> Progress here requires political will, sensitivity and strategic collaboration between ministries and other bodies. There is little doubt that as the public system becomes strengthened with investment and trained professionals, the need for one ministry to take a greater lead role will become apparent.

104. Although many policies are sound and wide ranging, the review team learned that some municipal authorities are antagonistic to reforms which, from their perspective, are foisted upon them with inadequate funding. There is still a challenge to persuade municipalities that they are responsible for the networks (public and private) operating in their respective areas. The team saw examples of municipalities that welcomed this new responsibility, but there are clearly others who are more reluctant. New responsibilities and threats to the existing order require negotiation and determination. It also is important for agencies and representatives of those expected to implement reform to be included in reform discussions. Above all, the common focus should be the development of the child and support for families.

## **Coherence and co-ordination of services**

105. There are a number of issues, which we think it important for the government to consider in relation to creating a coherent and co-ordinated system of early childhood provision. There is a need to address, for example the unrealistic division of provision for young

<sup>3</sup> In several countries (e.g., Spain, Sweden, the UK) the Ministry of Education has been given the responsibility - within the framework of a lifelong learning perspective - to co-ordinate and develop policy for early childhood across all ministries and ECEC providers.

children into social and educational sectors which sometimes impedes a holistic view of child and family needs. This separation often appears to have more basis in traditional divisions of competence among ministries rather than in the practical need of children and families. Segregation of care and education seriously weakens the coherence of the system, leads to compartmentalisation of responsibilities and makes seamless services for children and families more difficult to achieve.

106. The links between sectors and age phases could be strengthened to encourage continuity of experience. The team explored some of these issues during their visit to an integrated setting, which included pre-school through to compulsory school. The team was interested to see the opportunities this facility provided for ameliorating difficulties of transition e.g. creating opportunities for staff interaction and ideas sharing and join activities for children across age groups. Certain disadvantages can be attached integrated settings, the greatest being that the early years programme can be marginalised or seen simply as a preparation for later years rather than as a specialised phase within its own terms. However, provided that the professionalism of early years staff is recognised and that they have status and an empowered voice, integrated settings can be beneficial and allow a coherent view of children's development and continuity of provision.

107. In order to strengthen coherence in the field and create a culture of empowerment amongst practitioners, there is a need to adopt and encourage bottom up strategies which complement government by decree e.g., supporting initiatives such the "Modern School Movement" and the more recent **Associação Criança** (mentioned earlier), as well as in-service training programmes sponsored by the ICE (**Instituto das Comunidades Educativas**), the CEFEPÉ (**Centro de Formação Educacional Permanente**), the APEI (Association of Early Childhood Professionals), and so on. Practitioners could be encouraged to become more reflective and evaluative and take more responsibility for their professional development, perhaps by forming local early years

associations to promote good practice. It would be well also to encourage greater cross-sector and cross-age phase collaboration, for example, with staff focusing on joint curriculum, record keeping and self-evaluation. This would help continuity of experience for children and allow practitioners to develop mutual professional respect. The *Curriculum Guidelines* also provide an opportunity to promote coherence across the early childhood field through continuing partnerships with training institutions and others to support and monitor the implementation of the guidelines in ECEC settings.

### **Inspection and accountability**

108. Another important issue centres on the need for better inspection and accountability. The existence of a rather complex and incoherent system makes the task of inspection extremely difficult. There is a move by Ministries to introduce joint inspections but the process still remains unconvincingly segregated between the care and education sectors and in the case of *creche* provision, it remains exclusively the responsibility of the Ministry of Labour and Solidarity. We would suggest that the institutions of higher education, some of which have expertise in these areas, could feed into the monitoring process by developing policy in this area. There are several matters to explore: concepts of effectiveness, quality and accountability; cost benefit analysis and evaluations of policy initiatives; and the creation of systematic and effective self evaluation procedures for settings and staff, with the necessary external moderation, support and validation. It is important that monitoring and appraisal by inspection be open, such that reports of inspectors are publicly available to all. They need to be developmental, not punitive, that training would support identified weaknesses. There is a need, too, to expand the number of inspectors specialised in early childhood education and care. It seems unrealistic to have such a small group (only 17 inspectors under the auspices of the Ministry of Education) to monitor an expanding programme and a number of new and exciting initiatives.

109. At the moment, accountability also seems to be a challenge. We were informed that the state was obliged in the past to compromise in its supervision and support of the early childhood providers, as it needed all hands to maintain services and, in addition, many of the service providers were religious or of a voluntary nature.<sup>4</sup> A culture of self-regulation did not develop, while acquiescence allowed the authorities to avoid the confrontations and difficulties that are linked to enforcement issues. Reasons were advanced for this complacency: it would be financially and politically fraught to force through change; no major provider could be antagonised because, in a period of economic stringency, all efforts and contributions are needed. In addition, there is the feeling in Portugal that changes should come softly and incrementally, with a respect for tradition. In this context, the team felt that responsibility for quality monitoring across the system needs to be more clearly defined.

110. One way of ameliorating the situation would be to correct the current imbalance between accountability and autonomy. The state gives substantial grants to voluntary and charitable organisations and allows them a wide measure of independence of action, but it does not always contractually demand in return verifiable evidence of value for money, target achievement, or impact and outcome measures. The culture of accountability, appraisal and inspection needs to be developed. As discussed above, policy can often be strong in formulation but is sometimes ineffectual in implementation. Rigorous accountability and assessment will need to be applied and suitable self-evaluation tools developed.

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<sup>4</sup>The argument in favor of lenience in evaluating the performance of charitable or voluntary organisations does not make sense at the economic level. Foregone wages or imputable costs need to be taken into account at the national macroeconomic level, as (wo)man hours used in one area of activity, albeit charitable, denies their use in another. Hence, at a national level, voluntary work is not just a saving but a cost somewhere else. When used in a particular setting over a long period of time, large-scale charitable activity may cause recruitment problems, labour unrest and, as mentioned here, issues of accountability.

## Curriculum guidelines

111. The *Curriculum Guidelines* demonstrate that the state recognises the importance of quality early childhood settings, not only as a support to working parents, but as a key element to children's early development and learning. The team agreed with the general nature of the *Guidelines*, although their openness to adaptation and interpretation highlights the importance of monitoring, inspection, and assessment of implementation. This flexibility also allows for local expression in different parts of the country. As an example, the team visited a pre-school in a low-income area outside Lisbon serving predominantly children from a community of "travelling people." The pre-school teachers purposefully built on the children's strengths, such as their energy and creativity, to develop mutual trust and acceptance and create a positive learning environment. The staff expressed the importance of maintaining a flexible programme for these children who would not thrive as well in a system which was more strict or formal.

112. The team felt very positive about the stated aims for children and the holistic approach to early development and learning. We saw how these related to and were balanced with the acquisition of the more formal aspects of the learning-orientated goals. However, the reality of our observations during our visits to pre-schools often contrasted with the team's interpretation of the intentions of the *Guidelines*. At times, we observed formal structured learning, focused on fairly narrow aspects of cognitive development. The team felt that there could be more emphasis on social and expressive learning and that staff often missed the opportunity to use interactions and conflicts for social and learning development. As in other countries, fostering children's autonomy and personal choice remains a challenge.



113. No doubt, these challenges stem from the fact that the *Guidelines* are very recent, giving staff little chance as yet to work through the concepts and absorb the guiding principles of the text. The team's observations suggest also that *Curriculum Guidelines* will be effective only if their implementation is carefully monitored. In-service training provides a valuable opportunity for staff to become familiar with the guidelines and with approaches to successfully use them in the classroom. Otherwise, there is a risk that a model which is "too formal, too soon" will be adopted, which can be particularly difficult for those outside cultural norms and for late developers who can quickly acquire notions of failure. Pre-school needs to be viewed as more than preparation for later formal schooling but rather as an opportunity to establish lifelong dispositions to learn. The *Curriculum Guidelines* give a framework for this to be addressed but implementation will depend on proper inspection and on the support given to early childhood staff through training.

### **Staff terms and conditions of work**

114. The team had opportunities to talk with some excellent practitioners who were reflective and professionally focused. Indeed, there has been a laudable initiative to raise the status and level of professional qualification among early childhood staff, though the team was concerned that initial training curricula varied greatly across institutions. Nonetheless, the raising of professional qualification to graduate level for all teachers is a considerable achievement, which needs to be supported with adequate mentoring and monitoring of teachers. Both new teachers and teacher educators expressed disappointment that they had little contact with each other once student teachers had graduated. Since it is possible for some early year's staff to retire at 52 years of age, some experienced and talented staff left the profession with many years of potential contribution unfulfilled. Although there are some mechanisms in

place to encourage teachers already working in the field to upgrade their training to degree level (credits, higher retirement benefits, etc.), it is important that the courses for very experienced teachers build on their acquired knowledge and work in the field. We also would suggest that some of these valuable mature practitioners could help to develop inspection and monitoring procedures.

115. Providers voiced concerns about recent changes in terms and conditions of staff. Although these were welcomed in the public sector, the impact on other sectors was seen as a potential difficulty. The transient nature of the employment of the *Educador(a) do Quadro Distrital de Vinculação* was also seen by some as an issue that needed to be resolved. The professional development of staff in the many small-sized settings was recognised to be challenging. In the area around Braga, for example, a third of all pre-school teachers, moved school in one year. Issues arose from this, such as, continuity for children in relationships, continuity for the development of staff and the need to prevent disruption of staff teams. There were particular issues for recruitment in some localities, especially in isolated and deprived areas. In order to attract more teachers to work in such areas, the government might explore providing financial incentives, as the Background Report suggests.

116. Salary disparities among professionals working in the sectors add to the challenge of achieving cross-sector collaboration. It seems that IPSS staff is subject to less favourable conditions with regard to pay, hours of work and in-service regulations. Some *Misericórdias* and their professionals enjoy tax relief that is not open to others. In spite of the government's intention to regulate these inequities through increase in financial support to IPSS, the situation remains a concern. We also stress the importance of strengthening the provision of in-service training within the private and solidarity sectors and increasing the opportunities for cross-sector joint training.

117. The teacher's unions are recognised as strong defenders of the rights of their members but there was some concern voiced that unions, while defending legitimate interests, should avoid politicising the education field and should engage strongly with the government toward improving the professional quality and commitment of their members. In particular, the teacher's unions support of the centralisation of teacher appointments needs to be reconsidered given the impact this policy is having on the stability of early childhood workforce and on the children in pre-school settings.

### **Data and statistics**

118. At various times during the review, the team became aware of doubts about the reliability and validity of data and statistics. This is often the case in early childhood reviews as statistical data on ECEC is notoriously difficult to collate, even in data rich societies. Different methods of collecting data operate in the various sectors of health, education and the social services and across the different providers. There is a need for much greater coherence in methodologies. Several comments from our correspondents in Portugal suggest too that there is need to see openness and accuracy in information gathering as part of the democratic process. One regional official indicated that when asked to make returns, some staff in pre-school settings felt that they should provide answers to please, rather than viewing statistical data as an objective means of informing the authorities as to what has happened and so opening the way to necessary improvements. Another municipal officer suggested that if returns carried negative implications, correspondents would be tempted to bend figures e.g. in the case of small settings which, if their numbers fell below a certain point, would be threatened with closure. Yet another respondent suggested that attitudes to the collection of statistical data relate to the past. Statistics in the dictator years were seen as a concern to many people, and viewed as part of the states control mechanism. A cultural shift was required. Whatever

the validity of these remarks, the establishment of a Centre for Documentation and Information on the Child (CEDIC) at the University of Minho, with the expressed aim of creating a "databank on Portuguese children," is very welcome and suggests that some of these issues may shortly be addressed.

119. Data collection and statistical records concerning young children and families need to be co-ordinated and systematised so as to inform accurately policy development. There is a need to distinguish between places available and places taken. In particular, there seemed to be little data on provision and take-up of places by children under three years old. The team discovered several instances of anomalies in figures coupled with inadequacies in monitoring data collection methods. Triangulation of data and the establishment of some commonly agreed criteria should be priorities. Reliable evidence is necessary for policy makers to make informed decisions.

### **Economic issues and gender**

120. The rights of women are enshrined in the Portuguese Constitution and the evidence of their educational achievement and of their contribution to the economy is apparent. In fact, however, women are a social group for whom law and its implementation do not seem to match. There has, of course, been enormous progress, not least in the strong legislative terms, which protect women's rights and in the statistical evidence of their recent educational achievement. Yet there still remains, as in other countries, many societal pressures on women. As one academic suggested, "Women in Portugal have internalised the view that, no matter what their growing commitments to sustaining the economic viability of the family, they alone have the sole responsibility for child rearing, not the father nor the community nor the religious authorities nor the state, but the mother."

121. In some ways, women have established their right to do two jobs, one within the home and one outside. In common with much of the rest of Europe, roles of men have changed less. Studies show that Portuguese males are not yet enthusiastic about child rearing and do not take on significantly the burdens of household chores. In contrast, however, whilst the team was in Portugal a series of television advertisements were raising awareness of gender issues, a reflection of the way in which modern Portugal is beginning to address the challenge.

122. The sharing of household responsibilities is but one aspect of the gender issue. A more public aspect is that of equal wages, which has a real influence on household income and on sums spent on children. There is a strong argument for economic equity in pay conditions and in redistribution of taxes toward early childhood provision. If women are contributing to the expansion of the economy by taking on more paid work and becoming better educated, it seems equitable to devote some of the additional resources the state acquires from their labour activity to support measures to reconcile employment and family responsibilities - especially through providing accessible and high-quality early childhood provision for children from 0 to 3 years. Yet, there is a serious shortage of places for infants and toddlers and, as yet, a reluctance to see this as a priority issue.

## Chapter V

### Conclusions

123. Throughout the visit, the review team was impressed with the dedication by those working at all levels of the system to expanding and co-ordinating early childhood education and care in Portugal. It was clear that over the past few years, early childhood has become a political priority amongst decision-makers, and is increasingly a vote winner among citizens. Moreover, there is evidence from the economic figures that Portugal is spending a relatively large proportion of its GDP on education, and on early childhood in particular. The political will is apparent, and substantial investments are being made to improve access to, and quality of, early childhood provision. The review team recognises the achievements of recent years and encourages the relevant ministries to continue their fine work on behalf of children and families. In order to build on these signs of progress and promise, this final chapter suggests a set of policy areas for further thought and action.

124. *Improving coherence in policy-making and implementation:* There are moves to develop cohesiveness in policy across all providers and, whilst more needs to be done in this area, big strides have already been made in reducing the number of directly involved ministries and in ensuring collaboration and cohesion through joint approaches in decision making. Government ministers should continue to seek to eliminate overlap and propose further joint working and collaboration.

125. *Pre and in-service training for staff:* There has been a substantial rise in the status and qualification level of pre-school teachers. There is an increasing emphasis on the educational aspects of caring for young children and the need for appropriate training for staff in early childhood settings. To encourage collaboration, there could be more joint training including in-service between sectors and through age phases with a focus on

young children. Further guidelines by the government for the early childhood courses offered by higher education institutions would be useful to ensure consistency and comprehensiveness.

126. *Terms and conditions of service:* There were a number of issues involving the nature of the terms and conditions of service of practitioners. The practice of frequently moving some teachers to new settings can raise issues for staff, parents and children. Retirement age is another issue and there is a potentially damaging loss if capable and experienced senior staff retires early. An economically efficient way to introduce mentoring and monitoring in a self-evaluation process would be to make use of some of these teachers. In addition, the government should consider providing incentives for pre-school teachers who are willing to work in isolated and deprived areas and for those who accept administrative and leadership responsibilities within the public network.

127. *Strengthening inspection and self-evaluation:* There is a need to strengthen the inspection process. Evidence from abroad suggests that this can be done effectively and cost efficiently through an agreed, rigorous self-evaluation model, which might also encourage practitioners to be more reflective. To encourage a move towards this level of professionalism a joint working party, which would include unions, could look at initiatives to develop evaluation strategies. This would be in addition to the inspection process, which will need to be strengthened. Inspectors could act as validators of staff self-evaluation. The new *Curriculum Guidelines* give a baseline for practitioners aspiring to offer a quality experience to their children, and their implementation will need to be monitored and supported.

128. *Improving standards and accountability:* The state embraces diversity in its provision for young children and works closely with its partner providers. There are indications that one strategy for cross-sector improvement of all settings would be to set high standards

within the public sector that the private sector will either have to emulate or see parents transfer children to other sectors. There are other ways to increase quality. One would be to strengthen the relationship between state funding and the achievement by the providers of mutually agreed outcome measures. The level of autonomy given to non-government bodies needs to be strongly linked with notions of accountability.

*129. Addressing gender issues and the needs of children under 3 years:* There are some innovative ideas for addressing the gap in provision for children under three. The team saw a commendable example of an IPSS-supported nanny who worked in her own home, with access to training in a local centre and support from a supervisor. Generally, however, provision for those between birth and three is not a priority and there are deep cultural values which impede its growth. The relative lack of state support for the youngest children and the contradictory expectation that women should engage in work outside the home while being responsible for child-rearing and house-work suggest there are unresolved issues of gender equality in Portugal which need to be addressed. Perhaps the time is ripe to open and fuel a wider debate about the place of the state, children and families in Portuguese society and, in particular, about the needs of young children and women in the modern industrialised state. Government may wish to consider the extent of coverage for the children from 0 to 3 years and the role of Ministry of Education in monitoring the quality of their care, education and developmental experience.

*130. Keeping records of children and their transfer to other settings:* The team was aware that full records of children's achievement over time were kept by many settings but that these tended not to move with the children when they left either to primary schools or other settings. The early childhood constituencies may wish to establish together systematic record keeping procedures and protocols across sectors and across age



phases so as to ensure continuity of experience and staff awareness of the developmental level and previous experiences of newly admitted children. Such records can be especially useful for incoming staff in settings where staff turnover is a common feature.

131. *Improved implementation, monitoring and consultation:* Barriers to implementation have weakened the strength of many excellent government reforms. Monitoring and inspection needs to ensure that statute is matched by reality. A research and evaluation element in the budget of each new initiative would give feedback on the effectiveness of implementation and provide indications for the need to tighten regulations if they were not followed. Sometimes, too, initiatives flounder because of inadequate prior consultation. The welcome success of the agreed *Curriculum Guidelines* underlines the value of consultation. The government may wish to consider how to encourage and support more bottom up initiatives.

132. *Reliable statistics and an independent supervisory body for children:* Effective evaluation of policy and development of policy will also be dependent on reliable and accurate statistical data, e.g. inadequacies in the data sets covering provision and take up of places for the under 3 year olds need to be urgently addressed. In order to improve sensitivity to children's needs and overall information about their situation and status, government may wish to consider the possibility of establishing a central supervisory body for children such as the Ombudsman for Children in Norway or the Council for Children in Denmark. Such authorities would have a responsibility to represent the interests of children across all government agencies. This might be especially important for the child with special needs or who is at risk.

133. *Research on the quality of diverse forms of provision:* Diversity of setting types is seen as necessary to meet the diverse needs of children and families, but this diversity should not imply

diversity of quality. The extent to which different kinds of settings successfully address the needs of communities should be examined. Likewise, longitudinal cross-sector comparative research - which looks at full-cost effectiveness in different early childhood settings - would be informative to policy makers.

134. This report acknowledges the high priority accorded to the well being of young children in Portugal and the impressive expansion of early childhood services achieved over a short period of time. It is a society holding to long-established values while trying hard to address rapid change and its effects on the young. Some hard political realities have still to be faced in improving the situation of young children and families, but Portugal can be proud of what has already been achieved.



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## Appendix I

### OECD Review Team

**Mr. Anthony Bertram**

*Director*

Centre for Research  
in Early Childhood,  
Worcester College  
of Higher Education  
Henwick Grove, Worcester WR2 6AJ  
Reino Unido

**Ms. Michelle Neuman**

*Administrator*

Education and Training Division  
Directorate for Education,  
Employment, Labour  
and Social Affairs  
OECD  
2, rue André-Pascal  
75775 Paris Cedex 16  
França

**Ms. Kari Jacobsen**

*Adviser*

Ministry of Children  
and Family Affairs  
P.O.Box 8036 Dep.  
N-0030 Oslo  
Noruega

**Mr. Patrick Werquin**

*Principal Administrator*

Education and Training Division  
Directorate for Education,  
Employment, Labour  
and Social Affairs  
OECD  
2, rue André-Pascal  
75775 Paris Cedex 16  
France

**Mr. Jo Hermans**

*Co Act Consult*

Spartodonk 22  
6218 GM Maastricht  
Holanda



## Appendix II

### Information on the Portugal Background Report

The Portugal Background Report was co-ordinated by the National Co-ordinator, Teresa Vasconcelos, Escola Superior de Educação de Lisboa. Under her direction, the team of the Departamento da Educação Básica, Ministério da Educação, Lisbon, prepared the report: Maria Luísa Sobral Mendes, Maria Manuela Neves and Madalena Guedes. A Working Group was established for the preparation of the Background Report and Portuguese experts in early childhood education and care consulted. The members of the working group and the experts are acknowledged by name in the Background Report.

#### Section I

##### Definitions, contexts and types of current provision

1. Historical framework for the development of ECEC policies and types of provision.
2. Social changes which influenced ECEC policies and practices.
3. The status of women in Portugal.
4. General conceptualisations concerning childhood and early childhood.
5. Policies and support measures extended to children and families.
6. Health support measures within ECEC
7. Aims and objectives of ECEC. Target populations...
8. Age groups: ECEC and compulsory education...
9. Types of educational provision...
10. Institutions responsible for ECEC.
11. Other public institutions...
12. Private and non-profit institutions.



## Section II

### Definition of policies

#### A — Quality

1. Responsibility for quality criteria.
2. Policies and quality criteria guiding educational provision.
3. Inspection, quality criteria and control.
4. Gathering and sharing of experience.

#### B — Access

1. Conditions and criteria for access.
2. Provision and demand for the various types of ECEC
3. Programmes and strategies for intervention.

## Section III

### Policy approaches

#### A — Regulations

1. Extent of regulation
2. Entities responsible for ECEC regulations
3. Evaluation and enforcement of regulatory standards
4. Information gathering and sharing

#### B — Staff

1. ECEC staff: duties and training required
2. Career statutes for early childhood teachers
3. Initial and in-service training of early childhood teachers
4. ECEC staff salaries

#### C — Programme contents and implementation

1. Curricular guidance
2. Curricular guidelines
3. Curricular guidelines and pedagogical organisation
4. Strategies for the promotion of innovation  
and educational quality

**D — Participation and support to families**

1. Participation of parents and guardians
2. Information to parents
3. Support measures extended to parents to meet professional and family requirements
4. The role of local communities

**E — Funding**

**The specific case of the Autonomous Regions:**

**Madeira**

**Açores**

**Section IV**

**Evaluation and research**

Quality evaluation studies

Regional network studies

Studies on models and their implementation

**Section V**

**Conclusion**

**Bibliography**

**Glossary**

**Appendix**



## Appendix III

### Programme of the Review Visit

26 April to 5 May 1999

Monday 26 April

#### *The Educational System and Pre-school Education*

10h00 — 12h00

Meeting with the National Co-ordinator and the DEB team who prepared the National Report to exchange views on the programme and the methodology of the visit.

14h30 — 16h00

Meeting with the National Co-ordinator and representatives of the institutions who participated in the preparation of the National Report and other official institutions.

**Ministry of Education:** Dr<sup>a</sup>. Eduarda Boal, Director, the Gabinete de Assuntos Europeus e Relações Internacionais (Office of European Affairs and International Relations); Professor Doutor Paulo Abrantes, Director, the Departamento de Educação Básica (Basic Education Department); Professor Doutor Pedro Lourtie, Director, the Departamento do Ensino Superior (HE Department); Professor Doutor Domingos Fernandes, Director, the Departamento do Ensino Secundário (Secondary Education Department); Dr. António Fazendeiro, Director, the Departamento de Avaliação, Prospectiva e Planeamento (Evaluation, Prospection and Planning Department); Dr. Edmundo Gomes, Director, the Departamento de Gestão Financeira (Finance Management Department).

**Ministry of Labour and Solidarity:** Dr<sup>a</sup>. Joaquina Madeira - Director-General, from Direcção-Geral da Acção Social (Directorate Council for Social Welfare); Dr. João Rafael Almeida, Associação dos

Estabelecimentos de Ensino Particular (Association Private Schools); Dr<sup>a</sup>. Isabel Raposo Almeida, Departamento do Ensino Superior (HE Department); Dr. José Martins Carlos, Gabinete do Secretário de Estado da Justiça (Office of the Secretary of state for Justice); Dr<sup>a</sup>. Guilhermina Lopes, Instituto Nacional de Estatística (National Institute of Statistics); Dr<sup>a</sup>. Branca Virgínia Martins, Chefe de Divisão da Direcção-Geral da Acção Social, do Ministério do Trabalho e Solidariedade (Division Head, General Directorate for Social Welfare, Ministry of Work and Solidarity); Dr<sup>a</sup>. Fátima Serrano, Gabinete de Assuntos Europeus e Relações Internacionais do Ministério da Educação (Office of European Affairs and International Relations); Doutora Isabel Lopes da Silva, Instituto de Inovação Educacional (Institute for Educational Innovation); Dr<sup>a</sup>. Fernanda Valadas, Coordenadora do Núcleo Inspectivo dos Serviços Educativos, Inspeccção-Geral de Educação (Coordinator of Inspectors in Education, Ministry of Education).

16h30 — 17h30

Meeting with the Secretary of State for Education and Innovation, the Secretary of State of School Administration from the Ministry of Education and the Secretary of state for Social Reintegration from the Ministry of Labour and Solidarity.

## **Tuesday 27 April**

### *Types of Provision, School Management and Partnerships*

9h00 — 10h30

Visit to a pre-school education centre providing itinerant modality, at Palmela (Itinerant modality at Lau - CAIC at Bairro da Bela Vista). Contact: Dr<sup>a</sup> Leonor Duarte, CAE Setúbal;

11h00 — 13h00

Visit to Escola Básica Integrada da Quinta do Conde (pre-school, 1st, 2nd and 3rd Cycle) to participate in a debate on the new

management model and articulation between various levels.

Contact: Dr<sup>a</sup> Carmo Serrote. Participants: Teachers; Members of the School Council; Parents; Municipality; Students' representatives.

15h00 — 17h00

Meeting with Pre-school education and early childhood care partners (Departamento da Educação Básica). Participants: Associação de Estabelecimentos do Ensino Particular (Association of Private Schools); Padre José Martins Maia from the Association of IPSS - Private Institutions of Social Solidarity; Associação Nacional dos Municípios (National Association of Municipalities); Confederação das Associações de Pais, CONFAP (Confederation of the Associations of Parents).

## Wednesday 28 April

### *The Educational Component and Practices*

9h30 — 11h30

Visit to the Jardim de Infância n° 1 de Benfica.

Contact: Dr<sup>a</sup> Palmira Zambujo.

11h30 — 12h45

Discussion with the curricular guidelines co-ordinator, Doutora Isabel Lopes da Silva, the Co-ordinator of the Núcleo de Educação Pré-Escolar, Departamento da Educação Básica, Dr<sup>a</sup>. Miquelina Lobo (Pre-school Education Group at Basic Education Department) and the team of pre-school teachers.

14h30 — 16h30

Visit to Schools

Group A: Visit to a Jardim de Infância da Associação João de Deus

Contact: Dr. António Ponces de Carvalho

Group B: Visit to Colégio Moderno  
Contact: Dr<sup>a</sup> Isabel Soares.

17h00

Meeting with the Parliamentary Committee for Education  
(Palácio de S. Bento - 1200 Lisboa).

### **Thursday 29 April**

#### *Joint Pre-school Education Policies of the Ministry of Education and the Ministry of Labour*

9h30

Group A: Santa Casa da Misericórdia de Lisboa - Vale Fundão n<sup>o</sup> 1.  
Contact: Dr<sup>a</sup> Gabriela Colen.

Visit to a crèche, and crEche familiar, a Jardim de Infância and ATL  
"After School Hours Care" centre working together in the same  
building. Discussion with the pedagogical and social service  
teams of the institution.

Group B: Centro Social e Paroquial de S. Vicente de Paulo  
Contact: Father Crespo.

Visit to a creche, a Jardim de Infância and ATL - "After School Hours  
Care" centre working together in the same building. Discussion  
with the pedagogical and social service teams of the institution.

14h30 — 16h00

Meeting with the Serviços de Acção Social of the Ministry of Labour  
and Solidarity, at Ministério do Trabalho e Solidariedade. Participants:  
Dr<sup>a</sup> Joaquina Madeira, Direcção-Geral da Acção Social (Directorate-  
General for Social Affairs); Dr<sup>a</sup> Branca Virgínia Martins, Direcção-  
Geral da Acção Social (Social Affairs); Dr<sup>a</sup> Maria Manuel Mira  
Godinho, Centro Regional de Segurança Social de Lisboa e Vale do  
Tejo (Regional Centre for Social Welfare in Lisbon and Vale do Tejo);

Dr<sup>a</sup> Maria João Rebelo, Santa Casa da Misericórdia de Lisboa; Secretariado Distrital das IPSS; Dr<sup>a</sup> Isabel Miguéns Bouças, União das Misericórdias; Mutualidades.

16h30 — 18h30

Discussion about questions concerning Justice and the Rights of the Child (Direcção Geral da Acção Social). Participants: Juiz Armando Leandro, Juíz do Supremo Tribunal de Justiça (Judge, Supreme Court of Justice; Dr<sup>a</sup>. Dulce Rocha, representing the Alto Comissariado para a Igualdade e a Família (Office of the High Commissioner for Equality and Family); Dr<sup>a</sup> Ana Perdigão, IAC (Institute for the Support of Children). Professora Doutora Manuela Silva, investigadora.

## Friday 30 April

### *Child Healthcare*

9h00 — 10h30

Visit to Hospital Fernando da Fonseca, at Amadora.

11h00 — 12h30

Discussion on child's health and school health questions. Participants: Professora Doutora Maria do Céu Machado, Director of the Pediatric Division at Hospital Fernando da Fonseca; Professor Doutor Mário Cordeiro, Pediatric Counselor, Direcção-Geral da Saúde (Directorate General of Health), Ministry of Health; Dr<sup>a</sup>. Gregória von Ammen, Direcção-Geral de Saúde (Directorate General of Health), Ministry of Health; Dr<sup>a</sup>. Isabel Loureiro, Programa de Promoção e Educação para a Saúde (Promotion and Educational Programme), Ministry of Education; Dr<sup>a</sup>. Filomena Pereira, Coordinator, Núcleo de Orientação Educativa e de Educação Especial (Educational and Special Needs Education Counselling), Basic Education Department. Dr<sup>a</sup> Purificação Araújo, Comissão Nacional da Saúde da Mulher e da Criança.



*Initial and in-service teacher training - Statutes of teachers*

14h30 — 16h00

Meeting at the ESE of Lisbon on pre-school and 1st cycle teachers training. Participants: Dr. Abílio Amiguiño, ESE - Portalegre, Chairman of the Associação das Escolas Superiores de Educação (Higher School of Education Schools); Professora Doutora Amália Bárrios, President of the Conselho Directivo da ESE of Lisbon (Administrative Council Director); Professora Doutora Emília Nabuco, coordinator, the Departamento de Educação Pré-escolar (Pre-school Education Department), ESE Lisbon; Dr<sup>a</sup>. Cristina Figueira, ESE Setúbal; Dr<sup>a</sup> Maria João Cardona, ESE Santarém; Dr. António Ponces de Carvalho, ESE João de Deus.

16.30 — 18.30

Group A: Meeting with the Inspectors of the Ministry of Education and the Ministry of Labour and Solidarity.

Participants: Dr<sup>a</sup>. Carmo Clímaco, Subinspectora Geral de Educação (Deputy Inspectorate General for Education); Dr<sup>a</sup>. Fernanda Valadas, Coordenadora do Núcleo Inspectivo dos Serviços Educativos (Coordinator, Inspection Services for Education); Dr<sup>a</sup> Ana Maria Guardiola, Inspector from the pre-school education area; Dr. José Manuel Simões de Almeida, Inspector from the Ministry of Labour and Solidarity.

Group B: Meeting to discuss the early childhood teachers' statutes with the Teachers' Unions and Associação dos Profissionais de Educadores de Infância (the Professional Association of Pre-school Teachers)

**Sunday 2 May***Travel from Lisbon to Viana do Castelo*

## **Monday 3 May**

### *Expansion and Development of the School Network and Local Authority Policies*

9h30 — 12h00

Visit to a pre-school and a basic education school (1st cycle) institutions.

14h30 — 17h00

Visitors reception at the Town Hall. Discussion with local and regional partners on the Pre-school Education Expansion Plan in the scope of local authorities policies.

Participants: Dr. Defensor Moura, President of the Municipality; Dr<sup>a</sup> Flora Silva, from the Municipality; Dr. Manuel Isaías, from the Municipality; Dr<sup>a</sup> Gracinda Nave, Direcção Regional de Educação do Norte (Regional Education Directorate, North); Representatives of Centro Regional de Segurança Social do Norte and Subregional Centre (Regional and Subregional Centres for Social Welfare); Representative of Parents Association.

## **Tuesday 4 May**

### *Research on and Innovation in Early Childhood in Portugal*

Braga

9h45

Visit to a creche in a rural area - Centro Paroquial de Vila Franca do Lima.

11h00

Working session at the Instituto de Estudos da Criança, Universidade do Minho. Debate with the Director of the Centro, Professor Doutor Varela de Freitas, and with the Coordinators of the PIIP - Projecto de Investigação sobre a Infância em Portugal (Av<sup>a</sup> Central, 100 - Braga).

14h30 — 17h00

Meeting with researchers in pre-school education.

Participants: Professor Doutor Bairrão Ruivo, Universidade de Psicologia e Ciências da Educação do Porto (University of Psychology and Education, University of Porto); Professor Doutor João Formosinho, Instituto de Estudos da Criança, Universidade do Minho (Institute for Studies on Children, University of Minho); Doutora Isabel Lopes da Silva - Instituto de Inovação Educacional, (Institute for Educational Innovation); Professora Doutora Teresa Vasconcelos, Presidente do GEDEI - Grupo de Estudos para o Desenvolvimento e Educação da Infância (Group of Studies for the Development and Education of Children); Professor Doutor Manuel Sarmiento, Instituto de Estudos da Criança Universidade do Minho, Institute for Studies on Children); Dr<sup>a</sup>. Júlia Formosinho, Instituto de Estudos da Criança Universidade do Minho, Institute for Studies on Children); Dr. Édio Martins, representative of the Ministry of Education - DAPP

### **Wednesday 5 May**

Lisbon

10h30

Working session with experts

11h30

Meeting with the Working Group of the Departamento da Educação Básica