



# Skills anticipation in Portugal

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## Summary

Portugal takes a collaborative approach by involving stakeholders in the process of producing labour market intelligence. The first attempts to create a framework for skills anticipation were taken under the auspices of the Calouste Gulbenkian Foundation and the first generation of EU structural funds. The Specific Industrial Programme for Portugal (1988-1993) commissioned sector studies related to anticipating the demand for competences. (1) Over the same period, studies (2) identified the importance of the development of a skills anticipation system. Skills anticipation was undertaken more systematically after 1995, following the establishment of an institute dedicated to innovation in training (Instituto para a Inovação na Formação, INOFOR). Between 1998 and 2006, INOFOR and its successor (Instituto para a Qualidade da Formação) launched, with the support of the European Social Fund (ESF), a coordinated large-scale research programme on skills anticipation, based on a common methodology. (3) This programme produced a comprehensive set of sectoral studies with a skills anticipation dimension. (4) Skills anticipation was then discontinued at a governmental level; some skills assessment activities continued, although forecasting and foresight exercises were seldom carried out. More recently there has been a commitment to developing a process of skills anticipation and significant investment in skills anticipation has been made. For the time being Portugal's skills forecasting and intelligence infrastructure has been classified as 'in development'. (5)

In 2014, the National Agency for Qualification (Agência Nacional para a Qualificação, ANQ) and the National Agency for Vocational Education and Training (Agência Nacional para a Qualificação e o Ensino Profissional, ANQEP) issued national and regional priorities for the provision of qualifications at secondary level (6) in 2014-2015. (7) This document was based on the analysis of existing studies by the ANQEP and consultations with the social partners. (8) Investing in skills anticipation has since been seen as a crucial step in achieving the objective of attaining a better match between skills supply and demand.

Accordingly, the [Qualification Needs Anticipation System](#) (Sistema de Antecipação de Necessidades de Qualificação, SANQ) was created in 2015 with the aim of providing a comprehensive analysis of skills supply and demand. The current aim is to improve the quality and amount of information young people, jobseekers, employers, education and training providers and policymakers have available when deciding in which skills to invest. In particular, the SANQ was designed to collate data from the various skills anticipation exercises in order to inform government policymaking on skills and in planning education and training provision, both in the public and private co-financed sectors. Skills anticipation is also used by local and regional authorities to inform their skills policy decisions. The comprehensiveness of the SANQ is seen as one of its strengths, especially in linking skills assessment with funding of the vocational education and training (VET) system. Skills anticipation activities are expected to undergo further fine-tuning over the coming years.

Dissemination of data from the various skills anticipation exercises is seen as crucial to the success of

skills anticipation, and major efforts have been undertaken to publicise and disseminate the results produced by the SANQ. Labour market intermediaries (e.g. the public employment service [PES] and careers advisors) also play a role in disseminating skills intelligence to their target groups of jobseekers, young people and employers, amongst others.

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## Overview of the Portuguese approach

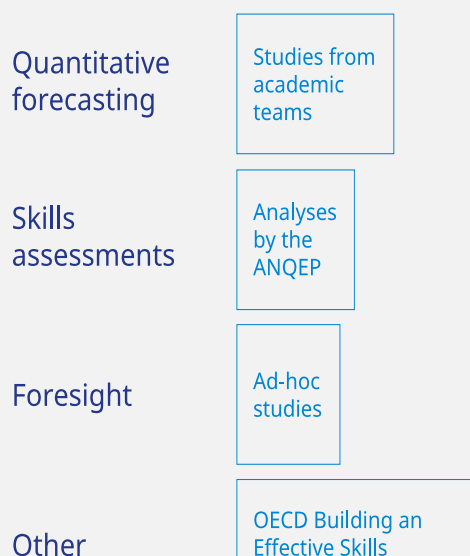
# Skills anticipation in Portugal



### Key actors



### Types of skills anticipation





## Dissemination

### Channels

Mainly website of SANQ

### Use

Design of vocational supply and number of classes by field of study and region by DGEstE

Assess VET courses to be supported by Managing Authority of the Operational Programme Human Capital

## Description

The [Qualification Needs Anticipation System](#) (Sistema de Antecipação de Necessidades de Qualificação, SANQ) is the core of the skills anticipation approach in Portugal. It is coordinated by the ANQEP, a government agency jointly supervised by the Ministry of Education (Ministério da Educação) and the Ministry of Labour, Solidarity and Social Security (Ministério do Trabalho, Solidariedade e Segurança Social).

SANQ's main contribution has been statistical information on labour market trends over the past five years, and information on skills needs derived from an employer survey. (9) Based on the analysis of data inputs mentioned above, the SANQ has developed a model that has three major outputs, which are made available online as part of ANQEP's [Portal of Qualifications](#). This is organised in the following three 'modules':

1. The Diagnostics Module (Módulo de Diagnóstico de Base) combines analysis of past and future trends in employment by qualification with analysis of the skills needs of employers, taking into consideration the regional dimension (at NUTS II level);
2. The Planning Module (Módulo de Planeamento) pays particular attention to the supply of, and demand for, courses over the past four years. It provides analysis for actors in the education and training system to support the identification and prioritisation of training needs for planning purposes; and
3. The Module for Regional Consolidation (Módulo de Aprofundamento Regional) applies the outputs of modules i and ii (outlined above) to the regional level. The regional dimension is coordinated by Inter-Municipal Communities (Comunidades Intermunicipais, CIM). (10) This third module is designed to mobilise local stakeholders to participate in planning and implementation. The outputs of the Planning Module are assessed by local stakeholders in processes coordinated by CIM that can lead to the revision of guidance regarding the provision of education and training at regional level.

The SANQ is used by various interested parties including policymakers. It has a direct impact on the provision of VET. On the basis of the criteria and priorities produced by the SANQ, the institutional actors involved in VET decide upon VET provision. The Ministry of Education through the Directorate-General of School Establishments (Direção-Geral dos Estabelecimentos Escolares, DGEstE) develops a map of VET course provision for mainland Portugal that becomes mandatory for VET in public secondary schools. It is also the basis for negotiation between the Ministry of Education and private vocational schools (Escolas Profissionais). The centres for vocational training that fall under the auspices of the Ministry of Labour – the Institute of Employment and Vocational Training (Instituto de Emprego e Formação Profissional) network – base their training offer on their own list of priorities. Nevertheless, this is also influenced by the outputs of the SANQ.

## Aims

The current policy is to create processes for skills anticipation which are responsive to skills demand in the labour market. This is important in the Portuguese context as research has shown that bringing about a match between the supply of, and the demand for, training is a major challenge for the VET system. (11),(12) Skills anticipation, as coordinated by the ANQEP, is closely linked to the VET system through which young people and jobseekers acquire the skills needed by the labour market. In this respect, the ANQEP aims to establish a model of vocational guidance that is suitable for the profiles, interests and expectations of students and jobseekers. (13)

## Legal framework

Currently the process of skills anticipation is based solely on the SANQ, which has been developed by the ANQEP in compliance with national legislation. (14) Qualifications are regulated by a National Catalogue of Qualifications (Catálogo Nacional de Qualificações, CNQ) within the framework of the National Qualification System (Sistema Nacional de Qualificações, SNQ). (15)

## Governance

The governance and funding of skills anticipation lies primarily with the Ministry of Education and the Ministry of Labour, Solidarity and Social Security. Each ministry individually engages in skills anticipation (either directly or indirectly), but in some cases the two ministries share jurisdiction. The responsibility for the ANQEP, which principally runs the SANQ, is shared between the two ministries. Key stakeholders taking part in skills anticipation exercises include the social partners (trade unions, employer associations, etc.), regional authorities, and international organisations such as the Organisation for Economic Co-operation and Development (OECD) (16) and the International Labour Organization (ILO).

The ANQEP is a key actor in skills anticipation in Portugal, as the regulator of the VET system and the implementer of public policy on adult education and training. The ANQEP fulfils a responsibility to provide nationwide skills information by undertaking skills forecasting, assessments and foresight exercises. In 2015, the ANQEP created the SANQ. The SANQ is the ANQEP's main anticipation instrument and covers mainland Portugal where 95 per cent of the country's population lives.

## The role of stakeholders

Broadly, the main actors involved in education and employment policies, which also make use of the results of skills anticipation activity, are:

- The Ministry of Education, the governing body with the authority to run the national school system, guides and controls private schools and defines legally binding standards for the VET system. Inside the Ministry, the DGEstE plays a central role in funding the education and training network, with the exception of the apprenticeship system, which is under control of the national PES;
- The Institute for Employment and Vocational Training (Instituto de Emprego e Formação Profissional, IEFP) is the national PES with responsibilities for employment policy and training (namely, the apprenticeship system, and training for the unemployed). The IEFP is a public body under the control of the Ministry of Labour, Solidarity and Social Security.

The principal stakeholders participate in skills anticipation at the national, sectoral and regional/local levels. A detailed list of stakeholders is given in section “Target groups’ uses of skills anticipation outputs” listed below are the different levels at which they engage in skills anticipation.

- At the national level, a Coordinating Council, with the participation of employer associations and trade union representatives, the national PES (IEFP), and the Agency for Development and Cohesion (Agência para o Desenvolvimento e Coesão), coordinates the implementation of European Funds, the ILO, and the ANQEP. Together these organisations monitor and evaluate the SANQ’s work.
- At the sectoral level, there are 16 Sectoral Councils for Qualification (Conselhos Setoriais para a Qualificação, CSQ), in which ministries, social partners, companies, VET providers, technology centres, competent authorities (regulatory authorities and/or certification authorities) and independent experts participate.
- At the regional/local level, there are the 25 CIMs representing local authorities. Some of the outputs delivered by the SANQ are locally-focused and are used by regional and local stakeholders in the CIMs to influence implementation of local VET supply.

These stakeholders jointly help to formulate the strategic objectives of skills anticipation with guidance from the ANQEP.

The ANQEP is the organisation most directly involved with skills anticipation. The ANQEP involves a broad range of stakeholders in its General Council, with representatives from several ministries (Education, Labour and Social affairs, Regional Development), the national PES, two bodies linked to the Ministry of Economy, employer associations, the trade unions, the National Association of Municipalities, the Association of Polytechnic Institutes, and the National Association of Vocational Schools (Associação Nacional de Escolas Profissionais, ANESPO). The involvement of these stakeholders in the ANQEP is designed to build capacity to further develop the activities of the SANQ, the ANQEP’s main anticipation instrument. In turn, the SANQ is monitored by a Coordinating Council, which validates its results, and is composed of representatives from the following institutions:

- ANQEP
- IEFP – Employment and Vocational Training Institute
- ADC – Agency for Development and Cohesion, responsible for the coordination of European Funds (Agência para o Desenvolvimento e Coesão)
- CGTP-IN – General Confederation of Portuguese Workers (Confederação Geral dos Trabalhadores Portugueses – Intersindical Nacional)
- UGT – General Workers’ Union (União Geral de Trabalhadores)
- CIP – Entrepreneurial Confederation of Portugal (Confederação Empresarial de Portugal)
- CAP – Confederation of Farmers of Portugal (Confederação dos Agricultores de Portugal)
- CCP – Confederation of Commerce and Services of Portugal (Confederação do Comércio e Serviços de Portugal)
- CTP – Confederation of Portuguese Tourism (Confederação do Turismo Português)
- ILO

The importance of stakeholders is also signalled by their membership in the Coordinating Council where they monitor, advise and validate the activities of the SANQ. This Council not only fosters the active involvement of stakeholders in the government’s approach to skills anticipation, but also encompasses a wide range of stakeholders (the social partners, employers, other public institutions and inter-municipal communities), touching upon several economic sectors and interest groups.

## Target groups

Outputs from the SANQ – and skills anticipation exercises in general – are intended for a broad range of users. These include policymakers (the DGEstE, CIMs, and the IEFP), the Centres for Qualification and Vocational Education (Centros para a Qualificação e o Ensino Profissional, CQEP), young people, employers, social partners, intermediaries such as careers advisers, and jobseekers.

## Funding and resources

No specific budget is dedicated to skills anticipation. The SANQ is funded by the government through the ANQEP, the Ministry of Education, and the Ministry of Labour, Solidarity and Social Security. In the past the government has also funded specific initiatives related to skills anticipation use such as the creation of the Integrated System of Information and Management of Education and Training Offer (Sistema de Informação e Gestão da Oferta Educativa e Formativa, SIGO) in 2007.

Funding for other skills anticipation exercises is often arranged by the organisation undertaking the exercise – for example, the OECD. The ANQEP also provides career and professional guidance services through its management of the CQEPs which were created in 2013. The CQEPs are co-funded by the ESF.

At least two major studies related to the production of labour market intelligence were co-financed under the Technical Assistance Operational Programme for the period 2007-2013 (17): Portugal 2020 – Anticipation of qualification and competence needs (Antecipação de Necessidades de Qualificações e Competências), (18) and a study on regional evaluation of skills needs part-financed by the ESF.(19)

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## Methods and tools

Various tools are used for skills anticipation in Portugal.

## Skills assessment

At the turn of the century, Portuguese authorities systematically assessed the skills needs of every economic sector in the country. (20) This assessment was never updated until the SANQ was established. By 2016, the SANQ had yet to develop its framework for sectoral analysis. Meanwhile, some stakeholders undertook their own skills assessments as part of their strategic aims. Examples of this are the health sector in a study commissioned by the Administration of the Health System (Administração Central do Sistema de Saúde), (21) as well those by employer associations on rural development (22), tourism (23) and trade. (24) The Training Centre for Thermal Waters (25) also commissioned such a study. Although there is no specific information on how these are used, it is expected that they guide the action of the commissioning institutions and contribute to dialogue on skills anticipation.

Over recent years, the approach of public authorities towards skills assessments has changed. Research commissioned by the ANQ and the ANESPO assessed the match between the supply of, and the demand for, training. (26) This produced, in 2011, a “traffic-light” indicator to show where there were mismatches between the supply of and demand for training. This led to a substantial transformation in the supply of training and the IEFP started publishing an annual list of priority areas for training under its responsibility. (27)

Priority areas of qualification (Saídas e áreas prioritárias de qualificação) by region are one of the main outputs of the SANQ’s skills assessment activities. These are tables for each of the five regions on the mainland (North, Centre, Lisbon/Tagus valley, Alentejo and Algarve) that rank, according to their relevance to the labour market, qualifications at lower secondary, upper secondary, (28) and post-secondary non-tertiary education levels respectively. (29) The ranking is partly based on the analysis of employment trends by occupation and region over the previous four years. The ranking must be addressed by public schools in making their educational offers. The negotiation with public authorities relating to the co-financing of private professional schools is also based on the SANQ’s outputs. According to rules defined internally by the IEFP, 85 per cent of its training centres’ activities should comply with these priorities. A margin of 15 per cent is left so that the identification of other priorities at the local level may be addressed.

Until relatively recently the anticipation of qualification needs did not play a major role in the planning and management of higher education. Since 2011-12, the [Agency for Assessment and Accreditation of Higher Education](#) (Agência de Avaliação e Acreditação do Ensino Superior, A3ES), created in 2007, certifies every course in higher education (1st, 2nd and 3rd cycle). It requests from those looking to have a course certified that it addresses labour market demand. This also applies to when course certification needs to be renewed (course certification usually lasts six years). (30)



## Skills forecasts

Skills forecasting was never systematically undertaken in Portugal, nor encouraged by law, though academic teams have been involved in this activity for some time. (31) Skills forecasting activities have been funded mainly by European funds.

The SANQ currently engages in skills forecasting. In fact, the tables for ranking professions mentioned above are partly based on its analysis of future skills needs. This analysis relies on (i) the future outlook of job offers by qualification and region obtained from companies; (32) and (ii) the CEDEFOP country forecast of skills supply and demand (up to 2025). (33)

## Skills foresight

Currently there is limited evidence of skills foresight exercises taking place.(34) In 2011, a study on employment policy developed scenarios on labour market developments. (35) Another study which focused on future of employment at the regional level looked at, amongst other things, the sectoral composition of employment up to 2020. (36) In general, foresight activity is infrequent and is dependent on the specific interests of the stakeholders that commission such studies.

## Other skills anticipation practices

In 2015, the OECD and Portuguese government established the project 'Building an Effective Skills Strategy for Portugal' with the involvement of various ministerial departments. The project was coordinated by the ANQEP. The project organised workshops at the national and regional levels, which formed, along with the latest international comparative analysis from the OECD, the basis of the [OECD Skills Strategy Diagnostics Report Portugal 2015](#). (37)

In addition to these efforts, other activities, such as those undertaken by sectoral employers' associations, are conducted, though they are generally unpublished.

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## Dissemination and use

### Use of skills anticipation in policy

Skills anticipation exercises primarily influence policy with respect to funding education and training; for example the SANQ's assessment of future skills demand has a direct effect on the provision of vocational courses. Based on the results produced by the SANQ, the DGEstE designs the provision of training supply, including setting the number of classes by field of study and region. The ANQEP also disseminates skills intelligence by publishing skills assessments online through the SANQ website. The EU Managing Authority of the Operational Programme Human Capital (Programa Operacional Capital Humano, POCH) also uses the SANQ's output to implement measures aimed at reinforcing the link between VET and the labour market. It has developed a means of assessing whether courses should be supported based on the SANQ's assessment of their relative priority.(38)

## Target groups' uses of skills anticipation outputs

Target groups include young people, jobseekers, employers, education and training providers and policymakers. By informing decisions on the number and type of courses available for funding (i.e. funding those that meet a demand in the labour market), skills anticipation exercises address young people's need for guidance on acquiring skills that are in demand. This is also valid for jobseekers' re-training through the VET system, as directed by the IEFP. Outputs from the SANQ are used to inform decisions about increasing or reducing the supply of courses in specific occupational and geographical areas. In this regard, the SANQ is also used by policymakers and educational institutions to plan their provision of courses. Labour market intermediaries including career advisers and the PES also use these outputs to support their services to their clients.

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## Endnotes

(1) For the list of these studies and the overall approach of the programme to industrial development of Portugal, see the Final Report (1994), produced by the Commission of The European Communities - PEDIP – Specific Industrial Development Programme for Portugal, COM(93) 711 Final.

(2) The study by Michael Porter's team (Monitor Company 1994), undertaken at the behest of the government and social partners, identified the need for a skills anticipation system if the country moved from its relatively low skill, low competitiveness position. Contemporaneously with this the Fundação Calouste Gulbenkian launched a project on the future of the country that included a study that forecast

education and employment (Carneiro 1988).

(3) INOFOR 1998.

(4) The following sources provide an overview of prospective studies produced in the comprehensive programme: Almeida 2006; Babo 2006; Babo 2005; Correia et al. 2000; Corvelo, et al. 2000; Corvelo et al. 2005; Curado et al. 2000; Evaristo 2005; Evaristo et al. 2001; Figueiredo 2006; Figueiredo 2005; Figueiredo et al. 2000a, 2000b, 2000c, 2000d, 2000e, 2000f.; Fonseca et al. 2001; Gaspar & Santos 2002; Maia et al. 2002; Martins 2006; Medina et al. 2001; Pinto 2006; Pires et al. 2000; Portugal 2006; Rocha et al. 2000; Rodrigues & Curado 2001; Sampaio et al. 2000; Sampaio et al. 2002; Santos 2004; Suleman et al. 1997; Suleman & Travassos 1998; Travassos 2006.

(5) Hawley-Woodall 2015, and Naumann 2015.

(6) At level 4 of the National Qualifications Framework (also level 4 of the EQF) and of dual certification (upper-secondary education and professional qualification).

(7) ANQEP 2014.

(8) The following social partners were consulted: Confederação dos Agricultores de Portugal (CAP), Confederação do Comércio e Serviços de Portugal (CCP), Confederação da Indústria Portuguesa (CIP), Confederação dos Serviços de Portugal (CSP), Confederação do Turismo Português (CTP), Confederação Geral dos Trabalhadores Portugueses- Intersindical Nacional (CGTP-IN) and União Geral de Trabalhadores (UGT)

(9) A forecast model from CEDEFOP is used for the prospective analysis of qualifications needs.

(10) The CIM are created by municipalities in order to address issues of common interest. Their attributions regard economic, social and environmental planning and inter-municipal investments. They have also attributions in education and training planning, among others (see article 81 of Law 75/2013 of 12 September).

(11) Pedroso 2012.

(12) Feliciano et al. 2013.

(13) Other important aims of the SANQ are: (1) the continuous updating of the National Qualifications Catalogue and better relevance of the qualifications; (2) a decentralised planning of the education and training provision in order to promote local and regional development; (3) a systematic analysis of the labour market (using and improving LMI).

(14) In 2015 in compliance with Law 82-A / 2014 (Major Planning Options for 2015), the ANQEP (the main VET system regulator) developed the SANQ (see Circular N°1/ANQEP/2015). ANQEP is in this framework mandated to continuously assess (i) the relevance of qualifications with respect to the labour market; and (ii) the main trends with regard to skills supply.

(15) Decree-Law 396/2007 (31 December 2007 confers the responsibility for defining and publicising the criteria for planning the network of initial training to be implemented by the competent authorities to ANQEP

(16) Portugal has implemented the OECD Skills Strategy over the year 2015 (OECD 2015).

(17) Programa Operacional de Assistência Técnica, POAT / ESF) of the National Strategic Reference Framework 2007-2013 (Quadro de Referência Estratégica Nacional, QREN).

(18) Carneiro, R. et al. 2011.

(19) Feliciano et al. 2013

(20) Between 1997 and 2005 35 sectoral reports on skills assessments (Evolução das Qualificações e

Diagnósticos das Necessidades de Formação) were produced and disseminated by Ministry of Labour.

(21) IESE 2012.

(22) IESE 2007.

(23) Quatenaire Portugal 2013.

(24) Quatenaire Portugal 2007.

(25) IESE 2006.

(26) Pedroso 2012.

(27) The list of priority training areas of IEFP for 2016-2017 is available online at

[https://www.iefp.pt/documents/10181/227378/%C3%81reas+de+educa%C3%A7%C3%A3o+e+forma%C3%A7%C3%A3o+prioritarias\\_2016-2017.pdf/78977f0f-f9f6-41a9-b193-650c94dffa9f](https://www.iefp.pt/documents/10181/227378/%C3%81reas+de+educa%C3%A7%C3%A3o+e+forma%C3%A7%C3%A3o+prioritarias_2016-2017.pdf/78977f0f-f9f6-41a9-b193-650c94dffa9f)

(28) Levels of qualification on an 8 point scale, as defined in national regulation (Portaria n.º 782/2009, of 23 July 2009).

(29) Levels 2, 4 and 5 of qualification according to NQF/EQF.

(30) Regulamento N.º 392/2013

(31) Carneiro et al. 2011.

(32) Sample constructed with the support of the GEP (Office for Strategy and Planning) at the Ministry of Labour, Solidarity and Social Security.

(33) CEDEFOP 2015.

(34) Note that a large body of sectoral studies coordinated by INOFOR/IQF between 1996 and 2006 made extensive use of skills foresight based on scenarios methodology..

(35) Pedroso et al. 2011.

(36) Feliciano et al. 2013.

(37) OECD 2015.

(38) See Aviso n.º POCH - 70-2015-03, annex III

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