



# Adult Learning Statistical Country Report – Portugal

A country report drawing on statistical data relating to participation in, and the financing of adult learning

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## **1 INTRODUCTION**

This report presents data relating to participation in, and the financing of adult learning in Portugal. The report also considers data about providers in adult learning, to a lesser extent. The data is drawn from the European Adult Education Survey (AES), the European Continuing Vocational Training Survey (CVTS) and the Labour Force Survey (LFS).

The report is broken down into three sections; adult learning participation, adult learning providers and the financing of adult learning. A separate synthesis report provides an overarching review of the EU-wide picture.

## **2 PARTICIPATION IN ADULT LEARNING**

This section reviews data on participation in adult learning and presents data across a number of fields against the EU average (where available).

## 2.1 Participation numbers in formal education and distribution by level of education (2013 and 2016)

Educational level	2013	2016	% Change
Early childhood to upper secondary	50,696	45,281	-10.7%
Post-secondary non-tertiary education	2,793	2,527	-9.5%
Short-cycle tertiary education	0	1,064	-
Bachelor's degree and above	127,184	104,927	-17.5%
Total	180,673	153,799	-14.9%

Source: Eurostat, UOE data collection, online data table: [[educ\\_uoe\\_enra02](#)]

The above data table shows the number of adults aged **25 and above** enrolled in formal education, distributed by the level of education that the participants are undertaking. Participation numbers, rather than (often low) rates of the overall population, are provided to aid interpretation.

The data available for Portugal shows a 14.9% decrease in the total number of people aged 25 and above participating in formal education – from 180,673 in 2013 to 153,799 in 2018. Part of this decrease is due to a 17.5% drop in people in higher education (in Bachelor's, Master's and PhD's) from 127,184 in 2013 to 104,927 in 2018. There has also been a reduction in adult participation in education at early childhood to upper secondary level, falling from 50,696 in 2013 to 45,281 in 2018.

The decrease in higher education (Bachelor's degree and above) can be explained by the strong economic crisis affecting Portugal after 2011 (up to 2017), as a result of the global crisis and of the structural adjustment policy imposed by the International Monetary Fund, the European Central Bank and the European Commission. This resulted in lower numbers of higher education students both under and above 25 years old. This decrease of people aged 25 and above in higher education also indicates the limited success of the Older Than 23 program (*Maiores de 23*) which aims to increase the number of adults, as non-traditional students, in higher education, namely in Bachelor's degrees<sup>1</sup>.

The decrease in compulsory education (from early childhood to upper secondary education) is linked to the abandonment in 2011 of the New Opportunities program (*Iniciativas Novas Oportunidades*) directed at improving adults participation rates in formal education and training. From 2011 to 2016, no relevant change in adult education public policy was implemented. Despite initiatives such as recognition of prior learning (*Reconhecimento, Validação e Certificação de Competências*) as well as adult education and training courses (*Cursos de Educação e Formação de Adultos*) and Modular training (*Formação Modular*), the lack of public policy solutions, large-scale provision, funding and human resources caused a decrease in participation in formal education (up to upper secondary education) .<sup>2</sup>

The only level of adult education showing an increase is short-cycle tertiary education (1,064 in 2016). This provision includes vocational and technical higher education courses (*Cursos Técnicos Superiores Especializados*<sup>3</sup>) introduced in 2014<sup>4</sup>. These courses are gradually replacing post-secondary non-tertiary education (*Cursos de Especialização*

<sup>1</sup> Tonin, E. C., Amorim, J. P. & Menezes, I. (2016). Os candidatos adultos não tradicionais – « maiores de 23 » - e a equidade de acesso à educação superior em Portugal. *Revista Brasileira de Ensino Superior*, v. 2, n.º3, 18-30.

<sup>2</sup> Lima, L. C. & Guimarães, P. (2019). Lógicas políticas da educação de adultos em Portugal. *Cadernos de Pesquisa*, vol. 48, n.º 168, 600-623 ;

<sup>3</sup> Data accessed in [https://eacea.ec.europa.eu/national-policies/eurydice/content/short-cycle-higher-education-60\\_en](https://eacea.ec.europa.eu/national-policies/eurydice/content/short-cycle-higher-education-60_en)

<sup>4</sup> Decreto-Lei n.º 43/2014, 18.03.

*Tecnológica*<sup>5</sup>) offered since 2006,<sup>6</sup> which have shown a decrease (-9.5%) from 2,793 in 2013 to 2,527 in 2016.

The increase in vocational and technical higher education courses is the result of education and training policies aimed at fostering competitiveness of the Portuguese economy in response to globalization.<sup>7</sup> Vocational education and training offered in upper secondary education has shown an increase followed by a stabilization in enrollments and attendance from 2010 (65,338 in VET courses – *Cursos Profissionais*) to 2018 (69,320 in VET courses).<sup>8</sup> Vocational and technical higher education courses are taught only in polytechnic higher education institutions. These institutions were introduced as part of new tertiary education pathways and are aimed at improving economic competitiveness. They reflect an effort to respond to the need for qualified workmanship in regional and local business sectors by raising adult learners' skills, in order to boost local economic growth.<sup>9</sup> Therefore, these courses are aimed at fulfilling training needs in geographic areas where providers are located.<sup>10</sup>

It is important to note differences in participation in formal compulsory education (up to upper secondary education) depending on gender, age and place of residence of adult learners. Young adults participate more than older ones, young women participate more than young men, and adult learners living in big towns participate more than those living in rural areas. Additionally, participation remains unequal for low-skilled adults, revealing a skills gap where older and low-skilled adults are at risk of falling behind. It is also important to note that low-skilled adults face many barriers to participation.<sup>11</sup> This is very clear when it comes to adult learners joining higher education. Barriers to participation in this level of education result in low rates of adult learners joining adult education – especially Bachelor's degrees – and create difficulties when rejoining the labour market.<sup>12</sup>

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<sup>5</sup> Data accessed in [https://eacea.ec.europa.eu/national-policies/eurydice/content/upper-secondary-and-post-secondary-non-tertiary-education-21\\_en](https://eacea.ec.europa.eu/national-policies/eurydice/content/upper-secondary-and-post-secondary-non-tertiary-education-21_en)

<sup>6</sup> Decreto-Lei n.º 88/2006, 23.05.

<sup>7</sup> Lima, L. C. & Guimarães, P. (2019). Lógicas políticas da educação de adultos em Portugal. *Cadernos de Pesquisa*, vol. 48, n.º 168, 600-623.

<sup>8</sup> Data accessed in

<https://www.pordata.pt/Portugal/Alunos+matriculados+no+ensino+secund%C3%A1rio+p%C3%ABlico+total+e+por+modalidade+de+ensino-1015>

<sup>9</sup> OECD (2018). *Skills Strategy Implementation Guidance for Portugal. Strengthening the Adult-Learning System. OECD Skills Study*. Paris: OECD Publishing

<sup>10</sup> Data accessed in [https://eacea.ec.europa.eu/national-policies/eurydice/content/short-cycle-higher-education-60\\_en](https://eacea.ec.europa.eu/national-policies/eurydice/content/short-cycle-higher-education-60_en)

<sup>11</sup> OECD (2018). *Skills Strategy Implementation Guidance for Portugal. Strengthening the Adult-Learning System. OECD Skills Study*. Paris: OECD Publishing; Canário, R., Vieira, C. & Capucha, L. (2019). *Recomendação para uma Política Pública de Educação e Formação de Adultos*. Lisboa: Conselho Nacional de Educação.

<sup>12</sup> Almeida, A., Quintas, H. & Gonçalves, T. (2016). Estudantes não tradicionais no ensino superior: barreiras à aprendizagem e na inserção profissional. *Laplace em Revista*, vol. 2, n.º 1, 97-111.

## 2.2 Participation rate in non-formal job-related training, 2011 and 2016

TRAINING	2011	2016	% Change	EU28 2011	EU28 2016	EU28 % change
Non-formal education and training - job-related	33.3	40	20.1	30.9	35.8	15.9
<i>not sponsored by the employer</i>	4	4.4	10	3.4	3.9	14.7
<i>sponsored by the employer</i>	29.3	35.5	21.2	27.5	32	16.4

Source: Eurostat, EU Adult Education Survey, online data table: [\[trng\\_aes\\_122\]](#) Note: a learning activity is considered employer sponsored if one or both of these two criteria are true – (i) it took place fully or in part during working hours and/or (ii) it was paid-for in part or in full by the employer.

The table above details the participation rates of adults in non-formal job-related training. Rates for the Member State and the EU average are provided for all job-related training and is also disaggregated by job-related training sponsored/not sponsored by the employer.

In Portugal, there has been an increase in job-related non-formal education and training – participation has grown by 20% from 33.3% in 2011 to 40% in 2016. This broadly corresponds to trends across EU28, where there has been an increase of 15.9% from 2011 (30.9%) to 2016 (35.8%). In both Portugal and the EU more widely, this increase is largely due to growth in non-formal education and training which is sponsored by the employer. In Portugal, participation in employer-sponsored learning has grown by 21.2%, from 29.3% to 35.5% across the period in question. This rate of growth is than across EU28 as a whole, where employer-sponsored non-formal job-related training has grown by 16.4% (27.5% in 2011; 32% in 2016). Non-formal adult learning which is not sponsored by the employer has shown a much smaller increase, rising from 4% in 2011 to 4.4% in 2016. This trend is similar to EU28 rates, which grew slightly from 3.4% in 2011 to 3.9% in 2016.

In Portugal, as well as in the EU28 in general, the majority of non-formal job-related education and training is sponsored by employers.<sup>13</sup> This situation can be explained by the fact that aims and content of job-related training are closely linked to work-related activities and changes in the workplace. It also reflects the influence and importance of adult education policies on human resources management, improving competitiveness, and building knowledge and skills of adult workers.<sup>14</sup> Another important factor is funding from the European Social Fund in Portugal, which has driven development of job-related non-formal education and training sponsored by the employer.<sup>15</sup> This program involves significant funding and supports a large amount of activities in this area. In fact, Portuguese enterprises and state departments in charge of vocational education and training have a large level of dependency on the European Social Fund.<sup>16</sup>

It is important to note that there are differences in participation depending on skill levels and size of organisation. Low-skilled workers have lower rates of participation than high-skilled workers, and employees of small and medium enterprises have lower rates than those working for big enterprises (larger than 249 workers).<sup>17</sup> Additionally, data does not reveal the structural problems in the Portuguese education and training system relating to the mismatch between professional competencies provided by non-formal job-related

<sup>13</sup> Instituto Nacional de Estatística (2017). *Educação e Formação de Adultos em Portugal : Retrato Estatístico de uma Década*. Lisboa : Instituto Nacional de Estatística.

<sup>14</sup> Lima, L. C. & Guimarães, P. (2019). Lógicas políticas da educação de adultos em Portugal. *Cadernos de Pesquisa*, vol. 48, n.º 168, 600-623.

<sup>15</sup> Programa Operacional Capital Humano (2019). *Relatório de Execução 2018*. Lisboa : Programa Operacional Capital Humano.

<sup>16</sup> Gabinete de Estratégia e Planeamento/Ministério do Trabalho, Solidariedade e Segurança Social (2017). *Relatório Anual de Formação Contínua. 2015*. Lisboa: Gabinete de Estratégia e Planeamento.

<sup>17</sup> OECD (2018). *Skills Strategy Implementation Guidance for Portugal. Strengthening the Adult-Learning System. OECD Skills Study*. Paris: OECD Publishing.



training and the local needs of trained workers, despite the strong commitment to job-related training.<sup>18</sup>

### 2.3 Participation rate in job-related v/s non job-related training (% of people aged 25-64 reporting at least one-non formal activity), 2016

Training	%	EU28 %
Job-related non-formal education	90	84
Non job-related non-formal education	16.7	30.1

Source: Eurostat, [EU Adult Education Survey](#). Special data extraction for DG EMPL. Note: the percentage indicates the share of adults, who have reported at least one relevant learning activity (i.e. at least one job-related or at least one non-job related) during the reference period, out of all adults who participated in non-formal learning activities.

The table above shows the proportion of people reporting at least one non-formal education activity, participating in job-related or non job-related training. Those reporting the activity are those that responded to the Adult Education Survey 2016. Note, totals can sum greater than 100%. This is because people over 12 months period can participate in both job-related and non job-related training activities.

In 2016, 90% of adults in Portugal said they had participated in at least one job-related non-formal learning activity, compared to 84% across the EU28. In the same year, rates for non job-related non-formal education were lower in the EU28 and especially in Portugal – the EU28 rate of 30.1% was nearly double the Portuguese figure of 16.7%. These figures are corroborated by data from the Portuguese National Statistics Institute, which shows the dominance of job-related non formal education.<sup>19</sup> This trend is observable in other European Union countries which do not have a strong tradition in adult education policies.

Low participation rates in non job-related non-formal education for adults in Portugal seem to be due to the lack of integrated adult education policies, which are needed to coordinate programmes and projects implemented by very different types of provision of adult education, both formal and non-formal. Therefore, state-funded and regulated provision is limited, concentrated in formal adult education as well as in job-related training activities (*formação profissional contínua*). Current forms of non job-related non-formal education include several types of provision lacking coherence and policy consistency, which may not even be viewed as adult education. This situation has been reinforced by discontinuous adult education policies imposed both at a national<sup>20</sup> and European Union level<sup>21</sup> and by the narrow focus of funding. Specifically, the European Social Fund is mainly directed at school certification and professional qualification including a vocational education and training component. The prevalence of non-formal job-related adult learning over non job-related activities highlights the lack of a comprehensive and integrated adult education policy that would give relevance to non-formal liberal adult education and foster

<sup>18</sup> Canário, R., Vieira, C. & Capucha, L. (2019). *Recomendação para uma Política Pública de Educação e Formação de Adultos*. Lisboa: Conselho Nacional de Educação.

<sup>19</sup> Instituto Nacional de Estatística (2017). *Educação e Formação de Adultos em Portugal : Retrato Estatístico de uma Década*. Lisboa : Instituto Nacional de Estatística.

<sup>20</sup> See Lima, L. C. (2008). A Educação de Adultos em Portugal (1974-2004). In Rui Canário e Belmiro Cabrito, Orgs., *Educação e Formação de Adultos. Mutações e Convergências*. Lisboa: Educa, pp. 31-60. This discontinuous trend in adult education policy in Portugal is very different from what can be observed in Central European countries, such as Germany and France, in which adult education is considered a pillar of the education and training systems, and in the Nordic countries, in which for instance non-formal/liberal adult education has been supported by State policies for several decades. Authors have claimed that continuous policies in Nordic countries justify the high adults' participation rates in lifelong learning – see Desjardin, R. Rubenson, K. & Milan, M. (2006). *Unequal Chances to Participate in Adult Learning: International Perspectives*. Paris: UNESCO-IIEP and Rubenson, K. & Desjardins, R. (2009). The impact of welfare state regimes on barriers to participation in adult education. A bounded agency model. *Adult Education Quarterly*, vol. 59, n.º 3, pp. 187-207.

<sup>21</sup> Antunes, F. (2016). Economising education: from the silent revolution to rethinking education. A new moment of Europeanisation of education? *European Educational and Research Journal*, vol. 15, no. 4, pp. 410-427.

participation, especially of those that are low-skilled and not usual participants of adult education<sup>22</sup>.

### 3 PROVIDERS IN ADULT LEARNING

This section reviews data concerning providers in adult learning. It presents the relevant data against the average data for the EU and expert interpretation around comparison with the EU average, national level considerations, as well as potential explanations for the data and trends, will be outlined.

#### 3.1 Share of participants in non-formal adult learning by type of learning provider, 2016

Provider	%	EU28 %
Commercial institutions	11	9.4
Employer	39.6	35.4
Employer's organisations	3.2	4.2
Formal education institution	7.4	7.6
Individuals	2	6
No answer	0.4	2.2
Non-commercial institutions	3.1	3.4
Non-formal E&T institutions	21.3	17.7
Non-profit associations	4.1	6.7
Other	7.2	6.3

Source: Eurostat, [EU Adult Education Survey](#). Special data extraction for DG EMPL.

The table above shows the main types of providers of non-formal adult learning for the Member State and the EU28 average. In Portugal, the main type of provider are employers (39.6%) and this is above the EU28 average.

In Portugal the most prominent providers of non-formal adult learning are employers (39.6%), followed by non-formal E&T institutions (21.3%). The least prominent providers are individuals (2%), non-commercial institutions (3.1%), employers' association (3.2%) and non-profit associations (4.1%). Provision by employers is slightly higher in Portugal (39.6%) than the EU28 average (35.4%), and non-formal E&T institutions also play a bigger role in Portugal (21.3%) than in the EU28 (17.7%). Like in Portugal, the least prominent provides in the EU28 are non-commercial institutions (3.4%), employers' organisations (4.2%), individuals (6%) and non-profit associations (6.7%). Therefore, there seems to be a similar distribution of rates between Portugal and the EU28, although in Portugal the rate concerning employers' providers and non-formal education and training providers is slightly higher than the EU28 rate.

Several factors explain the prominence of employers and non-formal education and training (such as the Institute of Employment and Vocational Training – *Instituto de Emprego e Formação Profissional*) as providers of non-formal adult learning in Portugal. In terms of its objectives and contents, non-formal job-related learning has mainly focused on developing workers in the workplace, as shown by different studies.<sup>23</sup> It has been an important pillar in the reconversion of the Portuguese economy since joining the European Economic Community/European Union in 1986 and in the context of increased globalisation. Workplaces – both state-dependent/public departments and enterprises as

<sup>22</sup> Canário, R., Vieira, C. & Capucha, L. (2019). *Recomendação para uma Política Pública de Educação e Formação de Adultos*. Lisboa: Conselho Nacional de Educação.

<sup>23</sup> Instituto Nacional de Estatística (2017). *Educação e Formação de Adultos em Portugal : Retrato Estatístico de uma Década*. Lisboa : Instituto Nacional de Estatística ; and Gabinete de Estratégia e Planeamento/Ministério do Trabalho, Solidariedade e Segurança Social (2017). *Relatório Anual de Formação Contínua. 2015*. Lisboa: Gabinete de Estratégia e Planeamento.

well as profit-making enterprises and non-governmental organisations/civil society organisations – have faced major changes in terms of work objectives, workplace organisation, quality assurance procedures, formal regulations and customer needs. Non-formal job-related learning is especially prevalent in large private/profit-making enterprises – particularly finance and ICT – and also in the public sector/state-dependent organisations. Non-formal job-related learning includes mainly courses developed in-house, although some activities were delivered by commercial institutions of education and training hired specifically for this purpose by employers. Education and training activities were mainly directed at workplace learning, with the aim of developing technical, practical and specialised competencies which are highly relevant to work activities. Most education and training activities were up to 30 hours per year by worker.<sup>24</sup>

The low importance of non-formal non job-related learning in Portugal is partly due to the lack of tradition of adult education policies promoting liberal/non formal education projects and activities.<sup>25</sup> Adult education policies in Portugal have been mainly directed at promoting formal adult education. This is partly to increase school level rates, and also to raise professional qualifications in order to modernise the economy and foster human resources management<sup>26</sup> in the context of globalisation and the opening of the Portuguese economy to the Economic Community/European Union.<sup>27</sup>

### 3.2 Share of non-formal adult learning hours by main type of learning provider, 2016

Provider	Total hours	Share (%)
Commercial institutions	35,777,006	10.1
Employer	113,115,352	31.8
Employer's organisations	8,792,525	2.5
Formal education institution	38,153,526	10.7
Individuals	7,278,555	2
No answer	385,285	0.1
Non-commercial institutions	5,580,697	1.6
Non-formal E&T institutions	111,345,497	31.3
Non-profit associations	10,766,380	3
Other	22,957,623	6.5
Trade unions	1,057,375	0.3

Source: Eurostat, [EU Adult Education Survey](#). Special data extraction for DG EMPL.

The table above provides the total time spent on non-formal adult learning, by type of provider for the Member State. Note that no EU average is available for this data.

In Portugal, 31.8% of all time spent on non-formal activities was provided by employers.

On the basis of the data available for this country, there is a significant variation in terms of non-formal adult learning hours delivered by learning providers. The most prominent adult learning providers are employers (with a share of 31.8%) and non-formal E&T institutions (with a share of 31.3%). The least prominent providers are trade unions (with a share of 0.3%), non-commercial institutions (1.6%), individuals (2%), employers' organisations (2.5%) and non-profit associations (3%).

In general terms, the figures on provision by hours correspond with data on the share of participants in non-formal adult learning by type of learning provider (table 3.1). Both sets of figures illustrate the importance of education and training concerning workplace

<sup>24</sup> Gabinete de Estratégia e Planeamento/Ministério do Trabalho, Solidariedade e Segurança Social (2017). *Relatório Anual de Formação Contínua. 2015*. Lisboa: Gabinete de Estratégia e Planeamento.

<sup>25</sup> Lima, L. C. (2008). A Educação de Adultos em Portugal (1974-2004). In Rui Canário e Belmiro Cabrito, Orgs., *Educação e Formação de Adultos. Mutações e Convergências*. Lisboa: Educa, pp. 31-60 ; Canário, R., Vieira, C. & Capucha, L. (2019). *Recomendação para uma Política Pública de Educação e Formação de Adultos*. Lisboa: Conselho Nacional de Educação.

<sup>26</sup> Lima, L. C. & Guimarães, P. (2019). Lógicas políticas da educação de adultos em Portugal. *Cadernos de Pesquisa*, vol. 48, n.º 168, 600-623.

<sup>27</sup> Mateus, A. (org.). *Três Décadas de Portugal Europeu*. Lisboa: Fundação Francisco Manuel dos Santos.

activities in Portugal. This learning activity is mainly developed by employers themselves or by enterprises offering education and training according to employers' needs, as well as education and training developed by the Institute of Employment and Vocational Training.

Data also shows the importance of commercial institutions in offering non-formal job-related training – funded either by the workers themselves or by employers – and the relevance of formal education institutions. The share of hours delivered by formal education institutions is higher than their share of overall provision (reported in table 3.1), which indicates that education and training activities attended by each adult learner are longer than the usual training developed by workers concerning workplace learning (which total around 30 hours per worker per activity).<sup>28</sup> In fact, adult formal education in Portugal includes schemes such as Recognition of Prior Learning (*Reconhecimento, Validação e Certificação de Competências*) and Adult Education and Training Courses (*Cursos de Educação e Formação de Adultos*) which may include more than 800 hours of education, training and learning.<sup>29</sup> A final point to note is the minimal role of trade unions as providers in non-formal adult learning. Unlike in other EU countries, Portugal has no major tradition of trade unions involved in education and training, apart from various projects and activities developed by trade unions in the 1990s in non-formal job-related training.

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<sup>28</sup> Gabinete de Estratégia e Planeamento/Ministério do Trabalho, Solidariedade e Segurança Social (2017). *Relatório Anual de Formação Contínua. 2015*. Lisboa: Gabinete de Estratégia e Planeamento.

<sup>29</sup> ANQEP. (2018). *Implementation of the 2012 Council Recommendation on Validation of Non-Formal and Informal Learning. One-off Report: Portugal*. Retrieved November 2, 2019, from: [https://ec.europa.eu/ploteus/sites/eac-eqf/files/pt\\_2.pdf](https://ec.europa.eu/ploteus/sites/eac-eqf/files/pt_2.pdf)

## 4 FINANCING OF ADULT LEARNING

This section reviews data concerning financing in adult learning. It presents the relevant data against the EU average along with expert interpretation to explain the data and trends.

### 4.1 Who sponsored adult learning in formal education and training, 2016

Payment	%	EU28 %
Fully paid by respondent	49.1	43.9
Partly paid by respondent	9.4	11.3
Free activity	16.8	11.5
Fully paid by someone else	24.6	30.8

Source: Eurostat, EU Adult Education Survey. Special data extraction for DG EMPL.

The table above shows the share of adult learners who participated in formal education and training, reporting on who paid for their participation, including the individual, participating in education or training activity, paying for it in part or in full himself ('respondent' in the above table).

In Portugal, about half of all adult learning in formal education and training is sponsored by respondents themselves (49.1%) – this is higher than the EU28 share (43.9%). Conversely, adult learning is less likely to be fully paid by someone else in Portugal (24.6%) compared to the EU average (30.8%), while free activity is slightly more prevalent in Portugal than the EU as a whole.

Formal education in Portugal up to the 12<sup>th</sup> grade (compulsory education) is free, although adult learners are required to pay for learning materials. When it comes to higher education, adult learners have to pay fees: for public/state-funded higher education institutions (which comprise the majority of institutions in Portugal), minimum and maximum fee limits are established by formal regulation for Bachelor's, Master's and PhD's degree. Student fees are important sources of funding for higher education institutions in Portugal.<sup>30</sup> It is important to note discontinuities in adult education provision in Portugal as well as variations in the European Social Fund funding, which negatively impact formal education provision and participation.<sup>31</sup>

<sup>30</sup> Data for 2018-2019 accessed in [https://eacea.ec.europa.eu/national-policies/eurydice/content/higher-education-funding-60\\_pt-pt](https://eacea.ec.europa.eu/national-policies/eurydice/content/higher-education-funding-60_pt-pt). Discussion on this topic can be found in Cerdeira, L. & Belmiro C. Democratization and accessibility in higher education in Portugal: recent changes/ Democratizacão e acessibilidade no ensino superior em Portugal: mudanças recentes/ Democratización y accesibilidad en la enseñanza superior en Portugal: cambios recientes. *Acta Scientiarum. Education*, vol. 40, no. 1, 2018. *Gale Academic Onefile*, Accessed 19 Dec. 2019.

<sup>31</sup> Lima, L. C. (2008). A Educação de Adultos em Portugal (1974-2004). In Rui Canário e Belmiro Cabrito, Orgs., *Educação e Formação de Adultos. Mutações e Convergências*. Lisboa: Educa, pp. 31-60 ; Canário, R., Vieira, C. & Capucha, L. (2019). *Recomendação para uma Política Pública de Educação e Formação de Adultos*. Lisboa: Conselho Nacional de Educação.

## 4.2 Who sponsored adult learning in non-formal education and training, 2016

Who paid for non-formal education?	%	% EU28
Free activity	37.4	23
Fully paid by respondent	16.6	19.4
Fully paid by someone else	43.5	52.5
Partly paid by respondent	2.2	2.8

Source: Eurostat, EU Adult Education Survey. Special data extraction for DG EMPL.

The table above shows the share of adult learners who participated in non-formal education and training, reporting on who paid for their participation, including the individual, participating in education or training activity, paying for it in part or in full himself ('respondent' in the above table). In the case of Portugal, 43.5% of training was paid in full by someone else (e.g. Government and/or employer).

Adult learning in non-formal education and training in 2016 is mainly paid by someone else (43.5%) such as the employer or is a free activity (37.4%), which means that it is covered by public funding. This may occur through state services or departments' budget, for instance in the case of non-formal education and training provided by the Institute of Employment and Vocational Training. The Portuguese figures are similar to the EU28 shares: most adult learning in non-formal education and training in 2016 is paid by someone else (52.5%) and is a free activity (23%). Rates of adult learning in non-formal education and training paid by respondents are slightly lower in Portugal (16.6%) than in the EU28 (19.4%).

Adult learning in non-formal education and training in Portugal is mainly based on activities developed by employers and related to workplace contexts and changes. Employers are important providers and/or funders of adult learning in non-formal education and training, namely activities that are job-related.<sup>32</sup> In terms of "free activity", EU funding, through the European Social Fund, is very important in Portugal: it is a major source of funding that directly supports education and training delivered by both employers and public/state-dependent organisations.<sup>33</sup>

<sup>32</sup> Instituto Nacional de Estatística (2017). *Educação e Formação de Adultos em Portugal : Retrato Estatístico de uma Década*. Lisboa : Instituto Nacional de Estatística ; and Gabinete de Estratégia e Planeamento/Ministério do Trabalho, Solidariedade e Segurança Social (2017). *Relatório Anual de Formação Contínua. 2015*. Lisboa: Gabinete de Estratégia e Planeamento.

<sup>33</sup> See data referring to 2018 in Programa Operacional Capital Humano (2019). *Relatório de Execução 2018*. Lisboa : Programa Operacional Capital Humano. The same data can be observed in reports concerning previous years that can be found in <https://www.poch.portugal2020.pt/pt-pt/Resultados/Paginas/poch-em-numeros.aspx>

### 4.3 Total expenditure for non-formal education and training

The table below shows the absolute total expenditure **in millions of Euro** on non-formal education and training. It combines three different sources of expenditure – individual's own expenditure (estimated according to the EU Adult Education Survey (AES)), expenditure by private sector employers (estimated according to the EU Continuing Vocational Training Survey (CVTS)) and expenditure by the public sector through Active Labour Market Policies (ALMP), (estimated according to the DG EMPL database on labour market policies).

	AES 2011	AES 2016	CVTS 2010	CVTS 2015	ALMP 2010	ALMP 2015
AT	572	944	1,392	1,324	1,484	1,589
BE	207: <sup>34</sup>		2,154	2,580	591	641
BG	18	28	68	140	1	6
CY	28	26	72	46	7	9
CZ	:	135	455	610	63	38
DE	5,839	5,431	12,746	15,479	6,997	6,180
DK	179	186	1,201	2,105	1,025	1,014
EE	21	24	42	100	8	16
EL	105	170	251	296	39	78
ES	1,115	3,942	3,878	4,135	1,909	1,231
FI	243	330	659	578	951	1,005
FR	3,126	3,601	13,004	13,321	6,501	5,925
HR	:	77	139	167:		97
HU	119	726	356	382	48	28
IE	:	109:		1,201	641	577
IT	2,554	3,025	3,896	4,514	2,341	2,761
LT	17	19	47	79	20	25
LU	43	37	227	316	15	27
LV	39	26	27	45	44	15
MT	9	9	34	45	1	2
NL	7	1,124	3,331	3,753	804	451
PL	557	467	763	1,000	129	51
PT	354	307	875	503	690	480
RO	38	46	183	289	4	2
SE	494	339	1,407	2,061	357	652
SI	50	94	191	282	44	16
SK	82	90	261	251	4	8
UK	:	3,189	3,820	5,171	307:	

Sources: Eurostat, [EU Adult Education Survey](#) (reference years – 2011 and 2016), special data extraction for DG EMPL; Eurostat, EU [Continuing Vocational Training Survey](#) (reference years – 2010 and 2015), special data extractions for DG EMPL; DG EMPL [Labour Market Policy \(LMP\) Database](#) (reference years – 2010 and 2015). Notes: the data is expressed in millions of EUR. ALMPL expenditure data for Italy is for the reference year 2014. CVTS data only includes expenditure by enterprises from the private economy with at least 10 employees, therefore, it does not include training expenditure for employees by micro-companies or public-sector employers.

<sup>34</sup> Denotes unavailable

From 2010/2011 to 2015/2016 there was a decrease in total expenditure in non-formal education and training in Portugal, across all three categories. Adult Education Survey figures, which estimate individuals' own expenditure, show a reduction from 354 million euros in 2011 to 307 million euros in 2016. A larger decline was observed in expenditure by private sectors employers (875 million euros in 2010 and 503 million euros in 2015), according to data from the EU Continuing Vocational Training Survey. Finally, public sector expenditure fell from 690 million euros in 2010 to 480 million euros in 2015, according to Active Labour Market Policies figures.

Portugal was the only EU Member State to experience decreased spending across all three categories. Some other countries show decreases in some categories, but not in others, and many countries show an increase in all three categories. Therefore, Portugal deviates from the EU as a whole by showing decreased expenditure in non-formal education and training from 2011 to 2016. This trend might be explained by the global crises that affected the country and especially by structural adjustments policies imposed by the International Monetary Fund, the European Central Bank and the European Commission to Portugal in 2011 up to 2016. Since then, these policies have been less widely felt in economic and social spheres. This trend also relates to the abandonment of the adult education policy New Opportunities Program (*Iniciativas Novas Oportunidades*) in 2011.<sup>35</sup>

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<sup>35</sup> Lima, L. C. & Guimarães, P. (2019). Lógicas políticas da educação de adultos em Portugal. *Cadernos de Pesquisa*, vol. 48, n.º 168, 600-623 ; ANQEP. (2018). *Implementation of the 2012 Council Recommendation on Validation of Non-Formal and Informal Learning. One-off Report: Portugal*. Retrieved November 2, 2019, from: [https://ec.europa.eu/ploteus/sites/eac-eqf/files/pt\\_2.pdf](https://ec.europa.eu/ploteus/sites/eac-eqf/files/pt_2.pdf)



#### 4.4 Non-formal education and training expenditure per participant

The table below shows the expenditure on non-formal education and training, calculated on a per-participant basis, in EUR (i.e. dividing the total expenditure of a particular source of financing by the total number of participants financed by that source). It combines three different sources of expenditure – individual's own expenditure (estimated according to the EU Adult Education Survey), expenditure by private sector employers (estimated according to the EU Continuing Vocational Training Survey) and expenditure by the public sector through active labour market policies (estimated according to the DG EMPL database on labour market policies).

	AES 2011	AES 2016	CVTS 2010	CVTS 2015	ALMP 2010	ALMP 2015
<b>EU28</b>	170	232	1,403	1,418	: <sup>36</sup>	:
<b>AT</b>	269	335	2,037	1,365	12,654	14,453
<b>BE</b>	106	:	2,323	2,600	4,697	4,664
<b>BG</b>	18	32	215	363	304	2,262
<b>CY</b>	146	121	1,118	839	2,628	1,492
<b>CZ</b>	:	52	296	281	:	:
<b>DE</b>	269	242	1,564	1,800	7,121	6,099
<b>DK</b>	116	145	2,558	4,685	12,926	18,273
<b>EE</b>	61	81	488	908	6,146	6,266
<b>EL</b>	181	206	1,040	1,050	24,494	2,509
<b>ES</b>	124	387	1,034	1,063	5,044	3,960
<b>FI</b>	166	244	1,425	1,257	16,752	14,541
<b>FR</b>	195	223	2,222	2,341	11,014	11,248
<b>HR</b>		113	825	825	:	5,854
<b>HU</b>	57	257	1,164	1,039	2,575	4,895
<b>IE</b>	:	86:		1,887	11,162	13,227
<b>IT</b>	222	229	1,215	1,149	2,995	3,536.0
<b>LT</b>	38	47	404	417	5,553	6,413
<b>LU</b>	219	272	1,845	1,838	16,485	20,624
<b>LV</b>	105	53	289	366	4,507	5,715
<b>MT</b>	119	114	1,027	1,158	694	2,701
<b>NL</b>	1	204	2,309	2,154	4,359	3,512
<b>PL</b>	119	94	406	425	7,386	9,428
<b>PT</b>	154	124	1,054	566	8,310	3,749
<b>RO</b>	46	75:		396	431	163
<b>SE</b>	152	121	1,775	1,668	23,032	19,376
<b>SI</b>	121	185	1,010	1,180	4,581	6,326
<b>SK</b>	67	65	608	451	2,675	3,672
<b>UK</b>	:	237	872	961	:	:

Sources: Eurostat, [EU Adult Education Survey](#) (reference years – 2011 and 2016), special data extraction for DG EMPL; Eurostat, [EU Continuing Vocational Training Survey](#) (reference years – 2010 and 2015), special data extractions for DG EMPL; DG EMPL [Labour Market Policy \(LMP\) Database](#) (reference years – 2010 and 2015). Notes: the data is expressed as average expenditure in EUR per participant in learning activities. ALMPL expenditure data for Italy is for the reference year 2014. CVTS data only includes expenditure by enterprises from the private economy with at least 10 employees,

<sup>36</sup> Denotes unavailable

therefore, it does not include training expenditure for employees by micro-companies or public-sector employers.

On the basis of data available, the expenditure in non-formal and training per participant in Portugal from 2010/2011 to 2015/2016 has decreased. Individual expenditure per participant fell from 154 euros in 2011 to 124 euros in 2016, according to EU Adult Education Survey data. The decline was even larger in terms of expenditure by private sector employers, which nearly halved from 1,054 euros in 2010 to 566 euros in 2015 according to EU Continuing Vocational Training Survey figures. Public sector expenditure showed the biggest reduction, falling by more than half from 8,310 euros in 2010 to 3,749 euros in 2015, as reported by Active Labour Market Policies data.

Portugal was one of only two countries (the other is Cyprus) to display a decrease in all three categories, while some countries experienced decrease in one or two categories. However, the majority of countries saw an increase in all categories. Therefore, Portugal seems to invest lots in adult learning but follows a contradictory trend compared to other EU countries. As above, this divergence might be explained by the economic difficulties and ensuing structural adjustment policies that the country experienced over the period in question. These factors affected public funding and funding available to profit-making enterprises and non-profit/civil society organisations for the education and training of workers and adults in general.

## 5 CONCLUSION

In conclusion, the following key points can be highlighted in relation to the following areas of Adult Learning on the basis of the data reviewed as part of this report:

- **Participation in Adult Learning:**  
Participation in formal adult learning has decreased from 2011 to 2016 in all levels of education. The exception to this trend is short-cycle tertiary education, where provision has been introduced. Conversely, participation in non-formal job-related adult learning has increased, especially adult learning sponsored by employers with a strong focus on workplace changes and skills development. It is important to create a national, comprehensive and integrated adult education policy that can combine formal and non-formal education, based on the aims of fostering modernisation, human resources management and democratic citizenship.<sup>37</sup>
- **Providers in Adult Learning:**  
Employers and non-formal E&T institutions such as the Institute of Employment and Vocational Education (*Instituto de Emprego e Formação Profissional*) are very important providers of non-formal job-related adult learning. A large number of non-formal job-related adult learning is either paid by employers or is free – that is, funded by public services or state-dependent departments. Formal adult learning is publicly funded up to upper secondary education. However, the total expenditure from 2010 to 2016 has decreased, with a corresponding drop in participation. In higher education, adult learners pay fees just like younger students, but the participation rates of adult learners are not significant. It is important to establish a permanent formal structure that goes beyond the National Agency for Qualification and Vocational Training (*Agência Nacional para a Qualificação e o Ensino Profissional*). The strategy should incorporate different ministries and establish wider objectives for the creation and implementation of a national, comprehensive and integrated policy of adult education.<sup>38</sup>

<sup>37</sup> Lima, L. C. & Guimarães, P. (2019). Lógicas políticas da educação de adultos em Portugal. *Cadernos de Pesquisa*, vol. 48, n.º 168, 600-623.

<sup>38</sup> Canário, R., Vieira, C. & Capucha, L. (2019). *Recomendação para uma Política Pública de Educação e Formação de Adultos*. Lisboa: Conselho Nacional de Educação; Lima, L. C. & Guimarães, P. (2019). Lógicas políticas da educação de adultos em Portugal. *Cadernos de Pesquisa*, vol. 48, n.º 168, 600-623.

- Financing of Adult Learning:

There has been an increase in non-formal job-related funded activities, which has involved a raise of sponsored non-formal job-related adult learning. Funded non-formal job-related adult learning is prominent in big enterprises and public/state-dependant departments and services. In order to expand this provision, it is important to introduce financial incentives for employers in small and medium enterprises as well as targeting disadvantaged groups such as low-skilled workers in order to raise participation rates. It is also necessary to ensure adequate, stable and consistent funding for formal and non-formal adult learning (job-related and non job-related). A combination of the European Social Fund and state funding is essential to avoid shortfalls and discontinuities in public provision funding, which can create strong barriers to participation of low-skilled adults and those that are not usual participants<sup>39</sup>.

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<sup>39</sup> OECD (2018). *Skills Strategy Implementation Guidance for Portugal. Strengthening the Adult-Learning System. OECD Skills Study*. Paris: OECD Publishing; Canário, R., Vieira, C. & Capucha, L. (2019). *Recomendação para uma Política Pública de Educação e Formação de Adultos*. Lisboa: Conselho Nacional de Educação.

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