



INSTITUTO
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The Effect of the EU's Definition of Educational Policies on the Formulation of National Policies:
The Case of Portugal

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Master in International Studies

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ISCTE – University Institute of Lisbon

October, 2023



SOCIOLOGIA
E POLÍTICAS PÚBLICAS

Department of History

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ACKNOWLEDGEMENTS

In the first place, I would like to thank Professor Doctor Susana Martins, for the good guidance in the process of writing this thesis, especially in the finishing stages, where the anxiety was taking over my thoughts. Thank you, for being available whenever I needed.

Thanks to ISCTE and to professors of the International Studies Master for all the incredible lectures and great academic advice. Thanks for always encouraging me us to think critically.

My gratitude goes also to my employer for giving me time and liberty to write this dissertation while working at the same time, which wasn't always easy, but we tried out best to conciliate everything.

Thank you to my friends for the patience that they've always showed whenever I felt overwhelmed with everything that was going on at the same time. Thank you respecting when everything but them was a priority.

A very special thanks to my family, that have always given me the support that I didn't know I needed. My words will never be enough to recognize everything you do for me. Thanks for always taking care of me.

And last, but not least, thank you, Sandro, for your patience, for your invaluable emotional support and for always being present during the most difficult times, even when I am feeling tired and overwhelmed with everything and I am not the nicest person on planet earth.

RESUMO

A União Europeia (UE) tem sido um ator importante na definição das políticas educativas dos seus Estados-Membros. Através das suas iniciativas e recomendações políticas, a UE tem procurado promover um entendimento comum da educação e da formação para melhorar os resultados sociais e económicos em toda a região. No entanto, a implementação destas políticas varia entre os Estados-Membros, uma vez que cada país tem o seu próprio contexto político, social e económico.

Esta dissertação analisa o impacto da definição de políticas educativas da UE na formulação de políticas nacionais em Portugal de 2011 a 2021, incluindo os dois primeiros anos da pandemia de COVID-19. O sistema educativo português tem sofrido alterações significativas nos últimos anos, com reformas destinadas a melhorar os resultados educativos e a combater as desigualdades sociais. Neste contexto, esta tese tem como objetivo investigar de que forma as políticas educativas da UE influenciaram o desenvolvimento das políticas nacionais em Portugal.

Através de uma revisão exaustiva da literatura e da análise de documentos políticos, esta tese procura responder à seguinte questão de investigação: Qual o efeito da definição de políticas educativas da UE na formulação de políticas nacionais em Portugal e qual o impacto da pandemia de Covid-19?

Ao analisar o caso de Portugal, esta tese pretende contribuir para o debate mais alargado sobre o impacto das políticas educativas da UE na formulação de políticas nacionais. Os resultados deste estudo podem informar os decisores políticos em Portugal e noutros Estados-Membros sobre os potenciais benefícios e desafios do alinhamento das políticas nacionais com as iniciativas políticas da UE.

Palavras-chave: Políticas educativas; Políticas da União Europeia; Políticas Nacionais; Pandemia COVID-19; Europeização; Formulação de Políticas; Implementação de Políticas.

ABSTRACT

The European Union (EU) has been a player in shaping educational policies across its member states. Through its policy initiatives and recommendations, the EU has sought to promote a common understanding of education and training to improve social and economic outcomes across the region. However, implementing these policies varies across member states, as each country has its unique political, social, and economic context.

This thesis examines the impact of the EU's definition of educational policies on the formulation of national policies in Portugal from 2011 to 2021, including the first two years of the COVID-19 pandemic. The Portuguese education system has undergone significant changes in recent years, with reforms aimed at improving educational outcomes and addressing social inequalities. In this context, this thesis aims to investigate how the EU's educational policies influenced the development of national policies in Portugal.

Through a comprehensive literature review and analysis of policy documents, this thesis seeks to answer the following research question: What is the effect of the EU's definition of educational policies on the formulation of national policies in Portugal, and how has the Covid-19 pandemic impacted this?

By examining the case of Portugal, this thesis aims to contribute to the broader debate on the impact of the EU's educational policies on national policy formulation. The findings of this study can inform policymakers in Portugal and other member states about the potential benefits and challenges of aligning national policies with EU policy initiatives.

Keywords: Educational Policies; European Union Policies; National Policies; COVID-19 Pandemic; Europeanisation; Policy Formulation; Policy Implementation.

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GLOSSARY OF ACRONYMS

ASQN	Anticipation System for Qualification Needs
DEAP	Digital Education Action Plan
DLP	Distance Learning Plan
EC	European Commission
EEC	European Economic Community
EFTA	European Free Trade Association
EQF	European Qualification Framework
ESF	European Social Fund
ESM	European Stability Mechanism
ET	Education and Training
EU	European Union
HE	Higher Education
IOs	International Organizations
IVET	Initial Vocational Education and Training
ME	Ministry of Education
NAPs	National Action Plans
NQF	National Qualifications Framework
OECD	Organisation for Economic Co-operation and Development
OEEC	Organization for European Economic Cooperation
OMC	Open Method of Coordination
RTP	<i>Radio e Televisão de Portugal</i>
SEN	Special Education Needs
VET	Vocational Education and Training

WBL Work-Based Learning

INTRODUCTION

This study arises as an analysis of the Educational Policies of the European Union and Portugal, within the scope of the master's thesis in International Studies, as an answer to the departure question "What is the effect of the Educational Policies of the European Union in the formulation of National Educational Policies? The Case of Portugal, from 2011 to 2021". As objectives to design the research and in order to answer the departure question, three objectives were defined: (1) To analyse the educational policies implemented by the European Union between the years 2011-2021 through the active reading of documents, in order to understand their role in the formulation of policies in member states; (2) To evaluate the influence of European Union policies on the formulation of educational policies in Portugal between the years 2011-2021, through the analysis of bibliographic documents and statistical data, in order to identify which had the most significant effect; (3) To assess the impact of the COVID-19 pandemic on the educational policies proposed by the European Union and in Portugal, through the analysis of quantitative and qualitative data, to determine the influence of Europeanisation during the first two years of the pandemic.

The choice of the theme presented here emerges from the junction of two major factors in my life: the first is my interest in International Relations, which began during my education path and deserves my daily attention and made me choose the course to study in my master's degree; the second is my passion for education, and the search for efficiency and improvement in the quality of education for all students, which began earlier in my life. The choice of the European Union and Portugal for these studies is because I want to study something closer to my reality in order to understand how regional education policies (EU) influence national education policies (Portugal).

This document is structured as follows: the first chapter will be dedicated to a better understanding of three main concepts (Education Policies, Europeanisation, Learning Outcomes), that are important throughout the dissertation. Explaining the definitions different authors on these concepts, this chapter will offer a profound understanding on the influence of Europeanisation on educational policies, and how that reflects on the learning outcomes. The second chapter focuses on Europeanisation in education policies, where we can not only find the main policies adopted, both in the EU (European Union) and in Portugal, during the period of studies, but also, a brief framing of the evolution of education throughout the 20th/21st Centuries. The third chapter includes the measures adopted by Portugal and the EU,

during the first two years of the Covid-19 pandemic. Explaining the role of the EU during this whole process and understanding what the initial response of the Portuguese Educational system to the covid was, is crucial to understand how the Europeanisation directly influences the guidelines and principles adopted by Portugal. The fourth chapter in the themes analysis, to help us understand how connect are the different topics present in this dissertation, and how the Europeanisation ends up being present throughout the whole paper in different ways.

CHAPTER 1

LITERATURE REVIEW

1.1 - Educational Policies

According to the study conducted by Martins (2016), the European programs that are used to implement Community measures, led by the European Community, one of the prominent figures in European Union policies, began between the 1970/80s. Among these programs, we have the ERASMUS Program, which promotes the mobility of higher education students; PETRA, which promotes professional training and preparation of young people for adult life; EUROTECNET, a European technology and training network; and LANGUAGE, which promotes knowledge of foreign languages.

With the Maastricht Treaty in 1992, many proposals in the area of education began to be formulated, leading to a generation of programs in 1995, built as a framework to consolidate, preserve, and focus more on the previously stipulated objectives. The two programs created were The Socrates program, aimed at general and higher education, and the Leonardo da Vinci program, aimed at vocational training. After the first five years, some structural problems remained, showing that specific administrative and structural procedures in the European Union and the organizational patterns and forms of institutional implementation hinder their implementation (Martins, 2016).

In summary, there are three primary phases in the construction of educational policies in the European Union: the first one is prior to the Lisbon strategy in 2000, which led to the creation of evaluation instruments that make the systems more effective; the second refers to the construction of the European Education Area, through the "Open Method of Coordination," which allows overcoming the limitations imposed by regulation and consensus; the third one refers to Lifelong Learning, which gave rise to a new generation of educational programs in the European Union, for 2007-2013 (Dale, 2008 in Martins, 2016).

Educational policies in most developed countries are based on generally recognized basic principles, such as equal opportunities in access to education, where all citizens should have the same opportunities to learn. Democratic countries seek to fulfil this principle by offering a variety of programs to support disadvantaged groups, for example, the principle of lifelong learning, to provide educational opportunities at all stages of life, making education a

continuous and never-ending process. The idea of extending education intensified in the early 1970s due to economic and political changes, more specifically in the areas of technology and engineering; the principle of individualization and differentiation, based on the assumption that individuals who are educated require an individual approach, as we all have different knowledge and skills; It also should be respected that the different needs of students can be met if they are offered an individual approach; the principle of internationalization, since an essential part of the economy of the most developed countries comes from international relations. Thus, international institutions such as the European Union have launched several education support programs that allow access to education in foreign countries with a credit recognition system; the last one is the principle of differentiation of educational activities. Differentiation means that, besides the State, others should be involved in education, offering educational opportunities (Martins, 2016).

Also, studies of education policies have mainly focused on educational outcomes. There needs to be more research on whether education policies also affect the distribution of income and earnings in societies. However, that would be crucial because the effectiveness of education systems can be assessed not only in terms of the skills and qualifications produced but also in terms of the stratification in society that education policies create. Indeed, the effectiveness of education systems can be assessed not only in terms of the skills and qualifications produced but also in terms of the social stratification created by education policies (Checchi & van de Werfhorst, 2021).

1.2 - Europeanisation

The concept of Europeanisation first appeared in the 1980s in political studies literature. However, it has achieved greater recognition since the 1990s, even though it has yet to have a single, precise definition (Klatt, 2014). It comes from the influence that the European Union has on the policies implemented by the member states (Azevedo, 2007). It is the construction, dissemination, and institutionalization of common rules, procedures, and standards defined through public policies and policies implemented by the European Union. We can say that Europeanisation serves as a response to globalization, creating institutions at a European level (Martins, 2016).

To better understand the various definitions of Europeanisation and its scope, it is necessary to distinguish between essential and systematized concepts (Adcock & Collier, 2001). The evolution of the concept of Europeanisation dates back to the Renaissance period and is linked to the rise of European trade and individualism (Radaelli, 2004).

Europeanisation starts from the notion that there is an ongoing process of European integration and that the European Union has developed its institutions and policies over the past 50 years (Radaelli, 2004).

The theoretical endeavour of Europeanisation as a research agenda is to bring domestic politics into the understanding of European integration, not assuming that the balance of power between the state and European institutions is tilted in one direction or another (Radaelli, 2004).

Europeanisation is a process of a) construction, b) diffusion, and c) institutionalization of formal and informal rules, procedures, policy paradigms, shared beliefs, and norms, which are first defined and consolidated in the politics of the EU process and then incorporated into the logic of domestic (national and sub-national) discourse (Radaelli, 2004). This definition by Radaelli is based on an understanding of Europeanisation as an interactive process rather than a simple one-way reaction to 'Europe' (Salgado & Woll, 2004 in Radaelli, 2004). Europeanisation encompasses how domestic change is processed and demonstrates how patterns of adaptation can be more complex than simple reactions to 'Brussels.'

Radaelli, (2004) notes that some of the political mechanisms established by Europeanisation are either vertical or horizontal. The vertical is clearly distinguished at the European level from the national level; horizontal political mechanisms promote a form of adjustment to Europe based on market or socialization patterns, more linked to framing mechanisms (Martins, 2016).

Second-generation studies on Europeanisation have other exciting priorities. It is seen as 'orchestrating' previously existing concepts and theories, with great theoretical importance in comparative politics and policy theoretical analysis (Featherstone & Radaelli, 2003). While earlier research considered Europeanisation as an end state, more recent research has adopted the notion of Europeanisation as a process (Goetz, 2002 in Radaelli, 2004). Second, the aim is not to assess whether a country has become Europeanised or not but rather to require an explanation of what happens during the process. Third, Europeanisation encompasses vertical processes and horizontal dynamics. The European Union provides the cognitive and

normative framework, the terms of reference, which lead to an exchange of ideas, power, and policies between the members. Fourth, the new approach carefully distinguishes between the definition of Europeanisation and its possible impacts in terms of convergence and divergence. There is, however, more empirical evidence of divergence than of convergence (Radaelli, 2004).

Concluding the insights from bottom-up studies, Europeanisation is a theory introduced previously. It is an approach that allows orchestrating existing concepts and contributing to cumulative research in political science (Radaelli, 2004).

Joaquim Azevedo, (2007) defines five mechanisms of educational policies with external effects: harmonization, dissemination of priority agendas, standardization such as norms related to scientific criteria or human rights, the establishment of interdependencies such as the inclusion of common curriculum themes, and the imposition of international funders such as the World Bank.

The authors Buller & Gamble, (2002) define the concept of Europeanisation as somewhat different from its current usage, mainly by rejecting the understanding of Europeanisation as a process in which domestic policy is increasingly affected by EU membership. Alternatively, they argue that more time should be devoted to defining the concept "(...) before attributing any causal properties "(p.5).

They define it as: "A situation in which distinctive modes of European governance have transformed aspects of domestic politics." (p.17)

The first difference in this concept definition compared to many other authors is that Europeanisation is not defined as a process, but rather as a situation in which certain effects may have occurred. In other words, this definition aims to think more explicitly about what Europeanisation is, whether it exists, and how it can be found at the domestic level (Buller & Gamble, 2002).

Another distinctive feature is that this definition rejects the idea that Europeanisation (at the domestic level) can be described as inertia, absorption (in which the core remains unchanged while there is a change in non-essential aspects of the system), or retraction (it can easily resist change). In other words, if Europeanisation serves to trigger a condition to become 'like Europe,' then it must imply some sense of transformation (Buller & Gamble, 2002).

As many authors have noted when defining Europeanisation, the EU represents a system in which the domestic and European levels are now increasingly intertwined. At the same time, as Wallace (2000) points out, Europeanisation must be distinguished not only at the national level but also at the international and global levels. In other words, although European integration processes influence countries at the national level, Europe is not impervious to external influence either (Buller & Gamble, 2002).

As noted by Lawn and Grek (2012 in Mikulec, 2017), Europeanisation reflects "the complexity of processes that include, first, transnational flows and networks of people, ideas, and practices across European borders; second, the direct effects of the political EU; and, finally, the Europeanising effect of international institutions and "globalization." Consequently, the Europeanisation process can affect power relations both internally and regionally in the EU through various mechanisms such as financial resources, specific institutional resource requirements, new opportunity structures, and member states' beliefs and through learning and creating discourses based on various guidelines, peer pressure, monitoring, benchmarks, indicators, statistical data and networks (Lawn & Grek, 2012; Radaelli, 2008 in Mikulec, 2017).

In the early 2000s, discussions on Europeanisation focused on education, with the Lisbon Strategy being singled out by a lot of authors as the decisive turning point in the Europeanisation of education. Some authors argued that the key elements envisaged by the Lisbon Strategy for education can be understood as the establishment of a European education policy defined by common goals, although the Commission has very limited formal competencies in the field of education. The implementation mechanism of the European education policy consists of an open method of coordination (OMC), which introduces a new form of multi-level governance in education, exercised in the form of "soft law" through recommendations, guidelines, benchmarks, etc. (Antunes, 2012; Lawn & Grek, 2012 in Mikulec, 2017).

The development of the European Qualification Framework (EQF) and the implementation of its recommendation represent two of the results of Europeanisation in the educational process. As a key European policy instrument for lifelong learning, the EQF has been developed and controlled through various networks (EQF advisory group, EQF national coordination points, EQF peer learning activities), is governed by the Open Method of Coordination (OMC) and promoted through 'soft law' (EQF recommendation) (Elken, 2015).

At the same time, their implementation has been stimulated at the national level through various financial mechanisms, such as the European Social Fund (ESF), peer pressure, national representatives, and monitoring, which facilitated the development of NQFs in Europe. This facilitates the institutionalization of 'informal' rules and the transfer of standards from the European to the national level in the field of education. However, the extent of change in member states can vary greatly. Hall, (1993), for instance, distinguishes between three orders of change: the adoption of policy instruments, the development of new instruments, and fundamental change in ideology and ideas.

Moreover, the scope of change also depends very much on EU requirements and internal rules in the field of education. For this reason, when analysing the impact of the EQF, attention needs to be paid to the NQFs developed in different countries, as different educational contexts play a crucial role in mediating European effects (Rasmussen et al., 2015).

1.3 - Learning Outcomes

According to Adam, (2006), learning outcomes indicate what a learner is expected to know, understand, and be able to demonstrate at the end of a learning period. Their main advantage is the clarity and precision they bring to any curriculum development process. Thus, they can be considered a key element of the Bologna educational reforms, as they are a practical device and represent a methodological approach adopted to improve the competitiveness, transparency, recognition, and mobility of European education.

The learning outcomes represent a shift in emphasis from 'teaching' to 'learning,' characterized by what is known as the adoption of a student-centred approach, in contrast to the traditional teacher-centred point of view. Student-centred learning produces a focus on the teaching-learning-assessment relationship and on the fundamental links between the design, delivery, and measurement of learning (Adam, 2006).

According to Mikulec (2017), there are three important starting points for a better understanding of the concept of learning outcomes and the recent debates associated with this issue on the European continent.

First, in discussing learning outcomes, it is important to note that the idea of learning outcomes embedded in an NQF has its roots in the competence-based approach to vocational education in England and derives from the belief that all qualifications should be expressed in terms of learning outcomes, regardless of learning pathways and educational programs (Young, 2005). Young & Allaias (2011) argue that the common aim of outcomes based NQFs has been to reduce the autonomy of educational institutions and improve their efficiency by encouraging them to compete with each other. Consequently, institution-based education has become just one of many forms of qualifications.

Second, the concept of learning outcomes appeared in European policy documents around 2004 (European Commission, 2004). Since then, learning outcomes have increasingly been presented as something that will solve all the educational problems facing Europe and are seen as a key instrument for policy reform (Cedefop, 2009). Learning outcomes should not only solve the problems associated with transparency, comparability, quality, and efficiency of learning and qualifications but also facilitate second chances and bridge the gap between education, the economy, and VIL support mechanisms (Mikulec, 2017).

Third, the concept of learning outcomes used in European education policy has no clear definition and can be interpreted in various ways. While in some countries, learning outcomes are understood as learning objectives, in others, they are understood as occupational norms or competence norms, and in still others, as educational norms. For the sake of clarity, a distinction can be made between the concept of learning outcomes used in countries where education regulation is more centralized, such as continental European countries, and countries with a more unregulated education governance system, such as Anglo-Saxon countries. In more centralized systems, the learning outcomes not only stipulate the knowledge that the student will acquire and its level of complexity but also serve as a guide for the assessment of the knowledge defined as objectives. Learning outcomes in more deregulated systems are independent of educational programs and institutions, derived from economic objectives, better tailored to the needs of the labour market, and represent the learning outcomes achieved (Ermenc, 2012).

Following this agenda, the authors focused on the policy recommendation of the EQF as one of the main instruments of LLL, pointing out that the EQF was influenced by Anglo-Saxon traditions and demonstrated that learning outcomes could be interpreted differently, i.e., as autonomous elements leading to deregulation, commercialization and commodification

of education or as elements integrated into educational programs and institutions, thus ensuring different educational purposes (liberal, civic, vocational) and uniform quality and comparability of students' knowledge, skills, attitudes and virtues (Mikulec, 2017).

CHAPTER 2

EUROPEANISATION IN EDUCATIONAL POLICIES

2.1 - The Beginning of Educational Policies in the European Union

1960's

In 1964, the European Council adopted resolution 64 entitled, "Civism and European Education [in primary and secondary education]," in which recommendations are made and where the intervention of European organizations in the preparation of training courses or in the provision of European reference documentation. However, it is important to remember that, like the other implemented policies, these are not mandatory but optional (European Council, 1964).

1970's

In 1971, education appeared for the first time on the community agenda through the first meeting of ministers of education within the council of ministers, which also lacks binding power and does not attribute any competence to the European Economic Community (EEC) in matters of education.

In 1972, the Commission organized a working group called "Teaching and Education" in order to give a new impetus to community cooperation based on concrete actions (D'Iribarne, 1994 in Santiago, 2009).

In 1974, a resolution on cooperation in the field of education was adopted, which laid the foundations for cooperation. This aimed to correspond to the specific objectives and interests of each area, considering the specificities of each country; that cooperation is carried out in order to guarantee access to education for all migrants; and that diploma and the periods of study be recognized by the various countries, in order to eliminate obstacles and promote mobility and freedom of movement for professors, students, and researchers. This resolution also foresees the creation of an Education Committee in charge of defining an action plan composed of representatives of member states and the European Commission (Santiago, 2009).

1980's

In 1980, the Eurydice network was created as an information network on Education in Europe, which constitutes one of the strategic pillars created by the European Commission, with the aim of facilitating cooperation through a better understanding of educational systems and policies (Eurydice, 2009 in Santiago, 2009). Since the mid-1980s, and increasingly in recent years, programs and guidelines implemented at the European level reflect a consensus of thought on education (Nóvoa & Dejong-Lambert, 2006).

1990's

In 1992, with the signing of the Maastricht Treaty, education was included in the Community's program of action, but the Member States remained solely responsible for their education systems (Symeonidis et al., 2021).

During the first phase of European cooperation in the field of education, the association between schooling, identity formation, and the restrictions imposed by various treaties limited the potential for the application of educational policies by the European Commission. The result was the creation of more successful programs, especially regarding mobility and exchanges. However, three other trends present since the first attempts at cooperation in the educational field should not be ignored (Nóvoa & Dejong-Lambert, 2006).

To begin with, a broad interpretation of "professional training" allowed the European Commission to intervene in many educational areas through the application of some provisions related to the "labour market." Second, the construction of education statistics created an obligation for countries to organize data based on similar criteria to compare European education systems. A final factor was the constant presence of demands for the introduction of a European dimension in the curriculum. It usually consisted of references to European heritage and values. However, most of these attempts have failed (Cederman, 2000).

The Maastricht Treaty led to the initiation of proposals in the area of education (Ertl & Phillips, 2006). It created a generation of programs that began in 1995: The Socrates program,

aimed at general education and higher education, and the Leonardo da Vinci program, aimed at professional training. Both were built as framework programs to consolidate, preserve, and focus more on the goals of their precursors (Martins, 2016).

2000's

In 1999, the "mobile agenda" was adopted by the Board of Education, which signalled a growing integration of European education policies. In 2000, in Lisbon, two important decisions were taken: the transition to a knowledge-based economy and the adoption of an open method of coordination (OMC) to ensure a more coherent strategic orientation and a more effective monitoring of progress. The systemic use of Benchmarking became the strategy for implementing the open method of coordination, creating instruments that allow monitoring and evaluating the progress achieved (Nóvoa & Dejong-Lambert, 2006).

Since 2000, with the Lisbon Council, EU cooperation in education has intensified within the general framework of lifelong learning and a new governance instrument for Europeanisation, the Open Method of Coordination (OMC). The OMC has enabled a greater degree of EU intervention in national education (Hingel, 2001 in Symeonidis et al., 2021) and aims to disseminate best practices and lead to convergence on the main EU objectives. The broader integration process was formalized from the OMC, resulting in the emergence of a 'European Education Area' and a 'European Education Policy', which allowed education to find its place in European policy (Dale, 2009 in Symeonidis et al., 2021).

Open Method of Coordination

The Open Method of Coordination (OMC) was launched in 2000 to help the European Union achieve its goals of improving the effectiveness and coordination of policies through "soft law." It is an iterative process that encourages Member States to continuously improve and learn from each other (Zeitlin, 2011).

The OMC is characterized by flexibility, allowing Member States to translate the guidelines into specific action plans based on their particular situations. This flexibility is necessary due to differences between national social protection systems. The method also emphasizes decentralization, involving multiple stakeholders such as the Union, Member States, regional and local levels, social partners, and civil society. The establishment of

procedural routines aims to facilitate knowledge sharing by defining guidelines and indicators, regularly monitoring national reports, and seeking good practices. This emphasis on comparisons and knowledge exchange is considered the most innovative aspect of the Lisbon strategy. The absence of formal constraints allows for a peer review process that promotes learning rather than relying on traditional EU control mechanisms. The success of the strategy relies on emulation between Member States (Dehousse, 2003).

There are different types of OMC applied in different EU policy areas; however, the role of education is indisputable because, besides building national identities, it prepares young people for the labour market, which is why it is considered central to achieving the Lisbon objective of making Europe more competitive and cohesive. It also aims to achieve convergence between member states, on which the main social policy strategies lie, and how to shape and guide national and sub-national policymaking in relation to the European Union (Ferrera & Sacchi, 2005 in (Alexiadou, 2007).

The main features of the OMC are outlined in the conclusions of the Lisbon 2000 European Council, serving as a means of disseminating best practices and achieving greater convergence towards the main objectives set by the European Union. This method, designed among all member states, consists of four procedural elements: setting guidelines with specific timetables, establishing indicators and benchmarks, translating European guidelines into national policies, and regular monitoring (Zeitlin, 2011).

There is not just one OMC, but several, varying over time, but it is possible to verify some common core characteristics that are easily identifiable.

1 - The OMC is a form of 'soft law' where there are no formal legal obligations. In the field of education, the Commission has issued indicators that measure the quality of school provision, but which do not have to be compulsorily complied with by member states.

2 - The OMC is open to review, which makes the idea of "policy learning" increasingly important, as member states are encouraged to learn by exchanging information on best practices to be implemented.

3 - The OMC involves traditional public government actors, private actors, and civil society (trade union representatives, representatives of national associations, etc.). The European Commission has also set up a "network of experts" contributing to the development of education and training policies in Europe.

4 - The OMC operates based on five average performance indicators, used to identify best practices, and 29 indicators, which aim to stimulate debate between member states on the reasons for differences in performance. The indicators are considered the most powerful part of OMC education strategies, and the Commission publishes annual reports where member states' progress can be compared with benchmarks (Alexiadou, 2007).

The creation of the OMC has served as a tool and methodology for member states to respond to educational challenges. It is a method designed to cooperate with member states, which entails establishing specific lines, guidelines, and timetables for the achievement of short, medium, and long-term objectives; establishing indicators and benchmarks appropriate to the needs of different states and sectors; defining specific objectives and adopting measures, taking into account national and regional differences; monitoring, evaluating and reviewing these same objectives in the process of mutual learning (EC, 2000:37 in Martins, 2016).

The OMC for education develops by essentially contributing to the goal of 'sustainable economic growth' and, to a lesser extent, to the goals of social cohesion previously set by the Lisbon Council. It is argued that it follows a traditional set of values with a strong business agenda, where the private sector is seen as a key partner for successful school policies. Nevertheless, this corporate agenda of the OMC for education policies increases the risk of marginalization of social justice goals in education. References to the percentage of specific socio-economic groups that should contribute to the achievement of these overarching goals are missing. Similarly, gender in education also does not receive the necessary attention (Alexiadou, 2007).

Lisbon Strategy

The Lisbon Strategy was created in 2000 by the European Council, setting an ambitious goal for 2010: to make the European Union the most dynamic, competitive, and sustainable knowledge-based economy in the world (Fundo Social Europeu, 2007). It comes from the idea that for Europe to be able to compete in the context of globalization, it cannot do so with low wages, and there must be a greater valorization of human capital. Therefore, a knowledge-based Europe is needed, which affirms the dimensions of training, qualification, and competence and, at the same time, demonstrates the importance of education in the globalization process and in the development of Europe as a whole (Zorrinho, 2008).

Since then, the European Council has made this goal the focal point of the overall economic, social, and environmental strategy in the light of the general objective of ensuring sustainable development. This strategy, which has been developed at various European Councils since Lisbon (2000), is based on three pillars: the economic pillar aimed at preparing the transition to a competitive, dynamic, and knowledge-based economy; the social pillar in which the Member States are encouraged to invest in education and training and to develop an active employment policy in order to facilitate the transition to a knowledge-based economy; the environmental pillar, which draws attention to the need to reconcile economic growth with environmental requirements. Given that the policies concerned fall within the competence of the Member States, an open method of coordination (OMC) has been adopted, which includes the drawing up of national action plans (Fundo Social Europeu, 2007).

In 2005, there was a mid-term review of the Lisbon Strategy, which showed that the results obtained did not match the ambitions. Thus, to give new impetus to the Lisbon Strategy, the Commission proposed a coordination process and a concentration of efforts on national action plans (NAPs). In this way, the emphasis ends up being placed on the need for more urgent action in the Member States (Fundo Social Europeu, 2007).

To modernize the Social State so that countries may become more sustainable and with better energy efficiency levels, economic capacity is required so that they can invest in the social and environmental dimension. The main objectives are to strengthen credibility and trust, to be a more competitive country with greater social, territorial, and environmental cohesion, and to promote equity and gender equality. To this end, four global reference goals were established in relation to GDP growth, control of public accounts, increased investment in research and development, and employability. To fulfil the established goals, a strategy was needed to understand where to start focusing (Zorrinho, 2008).

Education and Training 2010

Under the Lead of the Lisbon Strategy, the work program "Education and Training 2010" established the first framework for European cooperation, introducing the Open Method of Coordination (OMC) in this field. This program defined three strategic policy objectives of the EU concerning the improvement of the quality and effectiveness of education and training systems, facilitating access to education and training, and opening up the education and training system to the wider world (Council of the European Union, 2002).

This cooperation was then renewed in 2009 with the launch of the "Education and Training 2020" program. The OMC is intended to improve the performance of national education systems by promoting convergence between them through the sharing of best practices. Both works created (ET 2010 and ET 2020) established strategies for EU policies and benchmarks at the national level in order to assess national performance (Council of the European Union, 2003 and 2009 in (Agostini & Capano, 2013).

Work Program for 2010

The Work Program for 2010 settled a new pace for European education policies. Prepared at the beginning of 2002, it was based on events and initiatives that have taken place since the Lisbon European Council. The main objective of the program is to organize EU educational standards into a "single comprehensive strategy" consisting of two types of activity: working on common challenges and efforts to utilize the potential of transnational activities in education and training. The document defines three strategic objectives, divided into thirteen related objectives and forty-three key questions (Nóvoa & Dejong-Lambert, 2006).

According to Horváthová & Čajková (2018), when the Education and Training 2010 Work program was coming to an end, the ministers of education of all the European Union member-states adopted a follow-up document called the Strategic Framework for European Cooperation in Education and Training. The follow-up document outlines four strategic objectives that correspond to a comprehensive focus on lifelong learning:

- Implement lifelong learning and mobility;
- Improve equality and effectiveness of education and training;
- Promote equity, social cohesion and active citizenship;
- Improve creativity and innovation, including entrepreneurship at all levels of education and training.

2.2 - Evolution of Education in Portugal

20th Century

Portugal was a founding member of the Paris Conference that founded the Organization for European Economic Cooperation (OEEC) (now OECD) in 1948, presenting a plan for a program in five areas in which education was included. The Portuguese education system was incipient. Official early childhood education had been abolished, compulsory schooling was reduced to 3 years, and it was considered that primary school teachers did not need much preparation. Thus, a process to bring an approximation to international policies that defended the expansion of education was initiated, mainly due to international pressure associated with the integration of EFTA in 1960 and the action of the OECD and its Regional Mediterranean Project, which defined conditions for Portugal to become a member of the OECD, that took place in 1961.

Despite advances in educational policy in the 1960s, in 1970, the country still had an illiteracy rate above 25%. It was only after 1974 that a substantial and accelerated recovery began to be seen in relation to the rest of Europe, but it ended up resulting in structural difficulties due to the high increase in school demand and the enormous growth in the number of students at all levels of education. Schooling. The increase in the birth rate at the end of the colonial war, which brought many national citizens back to Portugal, ended up putting enormous democratic pressure on the country in general and the education system in particular (European Commission, 2021).

Finally, in April 1974, a military movement led by the Armed Forces promoted a coup d'état that ended the Estado Novo and began the process of implementing a democratic regime. The post-revolutionary period was very troubled in political terms, with six provisional governments in two years (European Commission, 2021).

In 1983, technical-professional courses were created with a duration of three years that conferred equivalence to the 12th year in order to respond to the growing needs of Portuguese companies, with the objective of expansion and modernization (European Commission, 2021).

In 1986, Portugal's accession to the European Economic Community and the enactment of the Basic Law of Education. This law sought to reconcile developmentalism with the

principles that followed the revolution while implying non-specialized basic training for at least nine years. In the new general framework of the education system, preschool, school, and extra-school education was included, and basic, universal, compulsory, and, consequently, free education was also defined. There was a focus on economic development modernization that led to structural reforms in the education system, quality, and results in the education system, as seen in national and international rankings (Cordeiro & Alcoforado, 2018).

In the 1990s, adult education became a policy priority in Portugal due to the low levels of education in the adult population. With the help of the ESF (Fundo Social European Social Fund), the emphasis on education became a way to increase competitiveness and employability, which is why, in 2002, the system of skills recognition, validation, and certification was also established (Guimarães, 2013).

In 1993, the reorganization of the normative framework concerning educational support activities and measures was established, defining the basis for the application of differentiated pedagogy methodologies (European Commission, 2021).

21st Century

In 2001, the curriculum reforms for basic and secondary education were published. In basic education, the reform is structured according to the principles presented in the document "National Basic Education Curriculum"; in secondary education, the focus was on promoting professional education (European Commission, 2021).

In 2002, a political cycle began, marked by the idea of the European challenge and the institution of the Bologna process in higher education and the diversification of secondary education through the reformulation and qualification of technological and professional courses. The Lisbon Strategy emerged as the basis for the creation of policies that favour the transition to a society and economy based on knowledge, where the reduction of early school leaving becomes a reality as an indicator of success in educational policies (European Commission, 2021). Regarding the effects of the Lisbon Strategy in Portugal until 2007, it can be observed that Portugal was within the European average, proving the upward trajectory in the implementation of a modernization policy. The European Commission made a positive assessment, recognizing the effort that the Portuguese government had undertaken to achieve

favourable results in all dimensions of the outlined strategy. The Commission also acknowledged the capacity of the Portuguese government and society to respond adequately to the recommendations and priorities advocated by the European Commission (Fundo Social Europeu, 2007).

The focus of policies in 2005 was on extending compulsory education to 12 years of age, that is, up to 18 years of age, which was instituted in 2009. This period was marked by strong investment in education, with profound reforms in pre-school, basic, secondary, and higher education (European Commission, 2021).

As of 2011, due to the crisis and the consequent accentuated austerity, a set of subjects in basic education, such as civic training, and accompanied study, was abolished, and new vocational courses were adopted in basic and secondary education (European Commission, 2021).

2.3 - European agenda for public educational policies that effected on the period of study

2.3.1 - Principles of the European education policy

The most developed countries base their education policies on some basic principles. The first one is the principle of equal opportunities for education, where everyone has the right to be educated and the same opportunity to learn. Education policies based on this principle seek to ensure equal opportunities in access to education for all citizens. In order to fulfil this principle, democratic countries provide and sponsor a variety of programs to support the most disadvantaged groups, such as people with disabilities or national minorities.

The second is the principle of lifelong learning, which should provide people with the opportunity to be educated at all stages of their lives, thus a never-ending process. This idea grew more intensely in the early 1970s due to economic and political changes. As a consequence of the increasing need for more highly qualified people, raising living standards can be achieved through education, and lifelong learning turns out to be a proactive approach, as everyone interested is given the opportunity to continue their studies (Horváthová & Čajková, 2018).

The third principle materializes in individualization and differentiation, based on the assumption that students require an individual approach, as we all have different knowledge, abilities, and skills. The different needs of students can thus be met by offering an individual approach.

The fourth is the internationalization principle, considering that an important part of the economy of developed countries comes from international relations and trade. The level of education is usually related to democracy and the economic development of the country. Therefore, supranational institutions, such as the European Union, are launching various education support programs that allow studying abroad, and thanks to the credit recognition system, they do not have to worry about their studies abroad not being counted (Horváthová & Čajková, 2018).

The fifth and last is the principle of differentiation of educational activities, which means that the state is not the only one with the duty and ability to provide education; others,

for example, churches and private schools, should be involved in the process and provide educational opportunities.

These principles are among the most important of education policies, which are irreplaceable in the life of every citizen, and it is, therefore, in the best interest of states to produce quality education (Horváthová & Čajková, 2018).

2.3.2 - Europe 2020

Europe 2020 is a policy strategy launched in 2010. It was organized around three integrated pillars: 'macroeconomic surveillance, thematic coordination,' and 'fiscal surveillance' under the Stability and Growth Pact and three growth priorities: 'smart,' 'sustainable,' and 'inclusive' (Armstrong, 2012). This policy strategy was launched during a global economic crisis, which reinforced the idea that investment in knowledge accumulation and dissemination is crucial. It reflects an increased understanding of the importance of properly linking the different domains of knowledge systems (Hervás Soriano & Mulatero, 2010).

In June 2010, the European Council settled "five headline targets of the European Union." One of these concerns is education and stresses the need to improve education levels by reducing school dropout rates. As part of Europe 2020, the Council also adopted ten 'Integrated Guidelines'. Guideline number 9 addresses education and training by referring to the need to "improve the performance of education and training systems levels and increasing participation in tertiary education." Education and training are increasingly at the heart of the strategy for economic growth and social cohesion (Agostini & Capano, 2013).

European instruments for governance in education were developed at different times, with different objectives, and involving different numbers of countries. As such, these instruments have ended up being very fragmented, but the launch of Europe 2020 has represented an opportunity to promote their integration (Agostini & Capano, 2013).

Since its creation, there has been a partial convergence of the Bologna and Copenhagen Processes and the OMC. This convergence has been progressively reinforced, with their ends and means increasingly overlapping, before being integrated and incorporated into Europe in 2020. From this point of view, the evolution of soft policy in education instruments can be divided into three main phases. In phase one, the instruments were

launched separately; in phase two, the overlap started with the implementation of ET 2010; in phase three, the objectives and means used by these instruments were incorporated into the new Europe 2020 strategy, further strengthening the strategic role of education (Agostini & Capano, 2013).

Finally, the Bologna and Copenhagen Processes share several specific tools, such as the National Qualifications Framework (NQF). This instrument is intended to coordinate qualifications in order to promote international comparability and transferability. This tool was first introduced in HE through the Bologna Process. However, in 2008, the formal adoption process of the European Qualifications Framework (EQF) for lifelong learning encouraged the development of 'comprehensive NQFs' capable of including all levels and types of education. Currently, Member States are working to develop their NQFs and to link them with the EQF. In addition, these NQFs are now monitored by the European Centre for the Development of Vocational Training (Cedefop), an agency that supports the Commission in promoting and developing vocational and continuing training at the European level. This agency is closely involved in the follow-up to the Copenhagen process, and the implementation of the NQFs is promoting more overlap between Bologna and Copenhagen (Agostini & Capano, 2013).

2.3.3 - Education and Training 2020

The Education and Training 2020 program (ET 2020) is a strategic framework for European cooperation in education and training. It builds on the Education and Training 2010 work program (ET 2010) and aims to address the challenges of creating a knowledge-based Europe and promoting lifelong learning. The framework encourages cross-sectoral and transparent cooperation involving all stakeholders, and the Commission is tasked with supporting Member States' cooperation, assessing progress, and working on benchmarks for mobility, employability, and language learning.

European co-operation in education and training up to 2020 should be guided by a strategic framework that encompasses lifelong learning and education systems. The framework consists of four strategic objectives: 1) make lifelong learning and mobility a reality for all; 2) improve the quality and efficiency of education and training; 3) promote

equity, social cohesion and active citizenship; 4) enhance creativity and innovation, including entrepreneurship, at all levels of education and training (OIDEL, 2010).

The benchmarks set for ET 2020 included some important new features (when compared to ET 2010), such as: they set more ambitious targets, even if only one target for ET 2010 was met; a new focus on early childhood education; focus on the middle level of education (85% of young people completing upper secondary education) was replaced by a new benchmark focusing on tertiary education outcomes (ETUI, 2011).

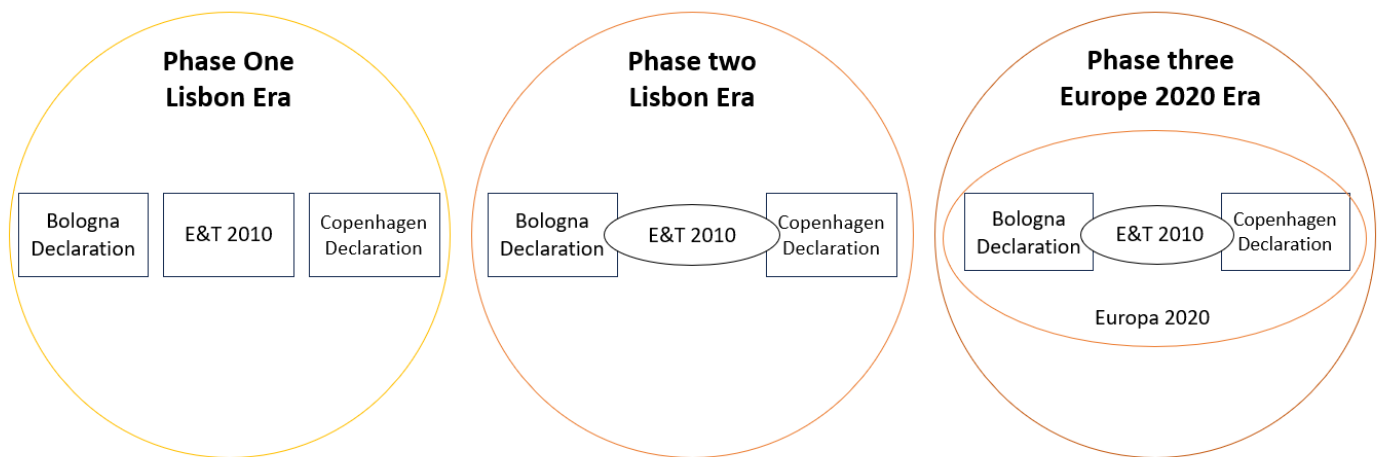


Figure 2.1 – Three phases of Education and Training 2010. Source: (Agostini & Capano, 2013), adapted by the author.

2.3.4 - The European Qualifications Framework (EQF)

The European Qualifications Framework (EQF) is a good example of the harmonization of education and training levels between different European countries through a common reference framework that serves as a translator to make qualifications more readable and understandable for different countries and systems in Europe. It aims to foster citizens mobility between countries and facilitate lifelong learning by increasing equivalence between the various national systems (EC, 2009 in (Martins, 2016). It allows combining the different contexts of the various countries and "(...) to assess more easily whether learning outcomes

acquired in these contexts are equivalent to formal qualifications in terms of content and relevance". (EC, 2009:4 in Martins, 2016).

This framework has two main objectives: to promote citizens' mobility between countries and to facilitate lifelong learning. The EQF ultimately serves as a tool for comparing different qualifications acquired in different systems (Komnenović et al., 2010). The EQF came into force in April 2008, setting 2010 as the recommended date for countries to relate their national qualifications systems to the EQF and 2012 for countries to ensure that individual qualifications certificates bear national qualifications systems to the EQF. That is, from 2012, qualifications issued must have a direct reference to a specific EQF level (European & Commission, 2008).

The purpose of the EQF is to enable individuals and workers to make easier and more efficient use of their qualifications to facilitate the comparison of qualifications across different countries and education systems, allowing greater mobility and improved exchange of knowledge and experience (Sredojevic, 2013).

Overall, "the majority of EU member countries aim for comprehensive frameworks covering all levels and types of qualifications and seek stronger integration between them. This is a significant result as it shows increased attention to the overall coherence and permeability of education and training systems and their ability to promote lifelong and life-wide learning" (Cedefop, 2010).

In 2008, the European Parliament and the Council issued the EQF Recommendation, which suggested that Member States (i) use the EQF as a "reference tool to compare qualification levels in different qualifications systems" while respecting the diversity of education systems; (ii) "relate their national qualifications systems" to the EQF and, where appropriate, develop national qualifications frameworks"; (iii) "use an approach based on learning outcomes when defining and describing qualifications"; and (iv) "apply the principles of quality assurance in education and training" (European Parliament and Council, 2008 in Mikulec, 2017). The two officially recognized aims of the EQF are to promote citizens' mobility between European countries and to facilitate lifelong learning by enabling qualifications to be compared across Europe (Mikulec, 2017). However, despite its non-binding nature, when the EQF entered the adoption process, European countries started to develop their NQFs according to the EQF recommendations. By the end of 2015, a total of 39 European countries had established or were in the process of establishing an NQF, 33

countries had proposed or adopted the EQF's 8-level structure, and 26 countries had linked their NQFs to the EQF (Cedefop, 2016). While the development of EQF-influenced NQFs in Europe has been remarkable, the empirical data and evidence collected fail to meet the broader set of goals and purposes they claim (Allais, 2010, 2014; Cort, 2010; Young and Allais, 2013 in Mikulec, 2017). These purposes include improving the functioning of economies and making education more socially and economically useful; improving the links between education and training and labour markets; increasing the transparency of qualifications; minimizing barriers to progression; developing the quality of the education system; increasing the flexibility of education and training provision; promoting parity of esteem for vocational learning; making the education and training system more demand-driven; and recognizing evidence of prior learning (Mikulec, 2017).

Moreover, as some researchers have shown, the EQF turns out not to be a neutral policy tool but rather a tool for the transfer of policies from ideologically dominant Anglo-Saxon countries (Cort, 2010). At the foreground of this transfer are the concepts of qualifications frameworks, learning outcomes, competencies, competence, and qualifications (Brockmann et al., 2008, 2009; Elken, 2015 in Mikulec, 2017). Although each European country defines learning outcomes, competencies, and skills differently, the EQF has adopted the "Anglo-Saxon definitions of 'knowledge,' 'skills' and 'competence' used as indicators of learning outcomes, without due consideration of the meanings of these terms in different national contexts" (Mikulec, 2017). The EQF is therefore based on the idea that "it is possible to specify educational outcomes independently of the curricular or pedagogical processes from which they result," which was "initiated by England in 1986 with the launch of National Vocational Qualifications" (Méhaut & Winch, 2012 in Mikulec, 2017). Learning outcomes represent a central mechanism for achieving the aforementioned NQF objectives, have been adopted by the EQF in the Anglo-Saxon tradition, and are supported by European Policy Documents that encourage a shift towards learning outcomes (Cedefop, 2009).

2.3.5 - Evidence-Based Policies in Education in Europe

Since the 1980s, several studies have been carried out that evaluate replicable programs in educational settings as researchers began to feel a greater need for evidence-based educational

programs and practices. With the exponential growth of interest in evidence-based education, policies have changed to support evidence in decision-making (Pellegrini & Vivanet, 2021).

According to Davies, (2004), evidence-based policy "helps people make informed decisions about policies, programs, and projects by putting the best available evidence at the centre of policy development and implementation." As reported by Slavin, (2020), evidence-based reform "refers to policies that allow or encourage the use of proven programs and practices in rigorous research." This definition points to producing effective and replicable structured programs through experimental evaluation. However, European authors and initiatives tended to prefer the term "evidence-based education." The use of this term has implications for both research and policy. For investigation, sources of evidence go beyond experimental studies and include qualitative and mixed methodologies; for policy, European Union (EU) documents provide guidelines regarding the use of evidence in educational decision-making (Pellegrini & Vivanet, 2021).

While interest in the evidence has grown in scientific communities across Europe, they have not yet reached a point where a program development and evaluation process can be effectively implemented. While every European country is responsible for its education, the EU has a role in promoting the use of evidence in decision-making at both policy and practical levels. The 2007 staff working paper aimed to provide policymakers and relevant stakeholders with an overview of actions already taken to enhance knowledge creation and application and to identify key challenges. Furthermore, it asserted that "evidence-based policy and practice must be the engine of reform of education and training systems" (Pellegrini & Vivanet, 2021, p.9).

In 2007, many EU countries were already actively addressing these challenges, setting up agencies and institutions to improve research and make it more relevant to policymaking. While individual countries are responsible for their education and training, the EU has started to support evidence-based policies and practices in its member states. The 2017 Eurydice report includes information on the Eurydice network's evidence-based policy support mechanisms and offers suggestions for improving the link between research, practice, and policy. Most countries have official agreements and various organizations to provide evidence for policymaking. However, agreements differ from country to country and range from legislation to generic guidelines on whom to consult to provide evidence in policymaking processes. There is little consistency in country positions on evidence-informed policymaking

and practice. As such, there are relatively few official agreements that support or facilitate the flow of information across Europe (Pellegrini & Vivanet, 2021).

Currently, several international projects aim to evaluate the effectiveness of educational programs to inform teachers and school leaders about proven interventions. School professionals have access to multiple databases and online resources to provide scientifically sound evidence on the effectiveness of teaching strategies. However, there is a relevant question regarding its external validity since evidence collected in a specific context cannot always be applied in a different context (Pellegrini & Vivanet, 2021). Berliner (2002) argued that the study of educational processes is extremely complex due to the variability of teaching and learning contexts since each one requires differences in programs, personnel, teaching methods, budgets, leadership, and types of community support, which causes great difficulties for scientists in understanding school life.

Although educational events have their characteristics, there is also a certain degree of similarity, which allows for predicting and adapting behaviour. Evidence provides a scientific knowledge base to support informed decisions in education, and even if a program cannot be applied in a different context without adjustments, the available evidence provides a reference from which recommendations can be drawn when designing an educational intervention. Therefore, according to one of the fundamental principles of evidence-based education, it is necessary to know what works and what pedagogical circumstances a given intervention is effective (Pellegrini & Vivanet, 2021).

European country systems have unique organizational models, from decentralized structures like Germany to centralized structures like France. And even at the local level, there are substantial differences, depending on the degree of autonomy conferred on schools by national legislation. Consequently, these differences between European school systems need to be considered when developing and/or adopting programs in line with national and local programs. To develop evidence-based policies and initiatives in education, adequate economic investment guaranteed to all EU member states is needed to support the advancement of educational research, the professional development of school principals and teachers, and the creation of supportive resources such as guidelines, effective programs and assessment tools (Pellegrini & Vivanet, 2021).

Although evidence in education has gradually taken hold in Europe by initiative and political intent, it is still not being systematically incorporated into member state practices.

Evidence generation and dissemination initiatives have been launched. However, except for networks created to ensure a greater exchange of evidence-based practices, these initiatives seem disconnected (Pellegrini & Vivanet, 2021).

Consequently, to ensure a more comprehensive development of evidence-based policy and practice in Europe in the future, certain issues need to be addressed. A development roadmap needs to be defined, with clear recommendations for EU member states regarding objectives, tasks, roles, and timeframes. Secondly, spending on education must be rebalanced across EU member states, providing adequate resources and directing investments in important initiatives (Pellegrini & Vivanet, 2021).

2.4 - Portuguese agenda for public educational policies during the period of study

The Portuguese education and training system comprises optional pre-school education, which covers children aged three to six years; primary education, which lasts nine years and comprises three cycles (EQF levels 1 and 2); secondary education (EQF levels 3 and 4); post-secondary non-tertiary education (EQF level 5); and higher education (EQF levels 6, 7 and 8) (Cedefop, 2021).

Compulsory education starts at the age of 6 and lasts for 12 years of schooling or until the student reaches the age of 18. It comprises primary and secondary education. Primary education lasts nine years and comprises three cycles; the first four-year Cycle and the second two-year Cycle are considered primary education, while the third three-year Cycle corresponds to lower secondary education. Secondary education comprises general education and VET (Vocational Education and Training) programs (10th to 12th year) (Cedefop, 2021).

	Basic Education									Secondary Education		
Expected	1st Cycle				2nd Cycle		3rd Cycle			Courses		
Age	6	7	8	9	10	11	12	13	14	15	16	17

Figure 2.2 – Compulsory education in Portugal. Source: made by the author.

2.4.1 - Vocational Education and Training

The National Qualifications System (NQS), introduced in 2007 and updated in 2017, is a key element for the development of vocational education and training. It has integrated the existing qualification subsystems and improved the quality of qualifications, facilitating access and progress in the labour market. The legislation that introduced the NQS also established objectives and tools to support the implementation of policy developments, for example, the national qualifications framework (NQF), the national credit system for VET, the anticipation system for qualification needs (ASQN), and the instrument for guidance and registration of individuals' qualifications and competences (Passport Qualifica). It is in line with the Recommendation of the European Parliament and of the Council on the establishment of the European Qualifications Framework for lifelong learning (Cedefop, 2021).

All VET programs within the NQS lead to a double certification: an education and a vocational certification, and some of the main objectives of the NQS are to (Cedefop & Directorate-General of Employment and Industrial Relations, 2019):

- (a) promote secondary education as the minimum level of education attained;
- (b) support the education and professional development of individuals;
- (c) adjust VET programs to labour market needs;
- (d) make VET more flexible with a lifelong learning perspective;
- (e) to strengthen the RVCC process;
- (f) promoting equal opportunities and supporting the integration of vulnerable groups.

The aim of VET is to equip individuals with skills and competencies to undertake one or more vocational activities (Article No. 3 of Decree-Law No. 14/2017 of 26 January in (Cedefop, 2021). The VET programs are usually part of secondary education, but since 2004, education and training programs for young people have been introduced in the second and third cycles of basic education.

All primary school graduates can enrol in the programs available at the secondary level. At the post-secondary level, there are technological specialization programs, and at the

tertiary level, there are higher vocational-technical programs, which are short-cycle higher education programs (Cedefop, 2021).

In order for VET to work, it needs financing, which comes entirely funded through the state budget, the Social Security budget, and the European Social Fund (ESF). Municipalities and the autonomous regions of Madeira and Azores also participate in the financing of VET (Cedefop, 2021).

- **Basic Education Programs**

Youth education and training programs are initial VET basic education programs (IVET), being part of a compulsory and formal education and training system. The main objective of these programs is to reduce the number of early leavers from education and training by offering flexible learning pathways and helping students enter the labour market. To attend these programs, students must have completed the first cycle of basic education and be at least 15 years old. CEF programs combine three school components, sociocultural, scientific, and technological, with work-based learning. The assessment is through a final assessment test (PAF), which includes a professional performance assessment by a jury. If they meet the relevant access requirements, they can continue their studies in secondary education (Cedefop & Directorate-General of Employment and Industrial Relations, 2019).

- **Secondary education programs**

Vocational programs are IVET secondary education programs that are part of compulsory and formal education and training systems. They are aimed at primary school graduates between the ages of 15 and 18 years and are provided by both private vocational schools and public secondary schools. The last three years have been the most popular VET programs. The programs include four components: the socio-cultural, scientific, and technological components are school based, while the WBL component is provided in the form of an apprenticeship carried out in a company or a public organization. Assessment includes a professional aptitude test (PAP) and consists of the presentation of a project to a jury. Graduates can continue their studies in technological specialization programs and in higher education (Cedefop & Directorate-General of Employment and Industrial Relations, 2019).

Apprenticeship programs are IVET secondary education programs, part of compulsory education and the formal education and training system. They target primary school graduates

up to the age of 25. The apprenticeship lasts three years, and the main objective is to equip students with relevant knowledge, skills, and competencies to enable them to find a job. They combine school-based socio-cultural, scientific, and technological training with compulsory WBL that takes place at school and in a company, where students are obliged to sign a training contract with the company. Students are assessed by a jury through a final assessment exam (PAF). Progression opportunities for successful graduates include non-tertiary or tertiary post-secondary education programs (Cedefop & Directorate-General of Employment and Industrial Relations, 2019).

Specific curricula programs are IVET secondary education programs that lead to the certification of the completion of compulsory education and a vocational certification at EQF level 4. Part of compulsory education and the formal education and training system are delivered by private and cooperative schools; however, since 2012, they can also be delivered by public schools. Unlike vocational programs, in these programs, the schools have the autonomy to diversify the education and training offered by combining elements of general and VET programs, considering the needs and expectations of the local community. They last three years and include four training components: general, scientific, technological, and WBL, with an internship in a company or other host entities. The assessment includes a technological aptitude test (PAT), a presentation before a jury of a project that demonstrates the knowledge, competencies, attitudes, and professional skills acquired by the students. Graduates can continue their studies in higher education or enter the labour market (Cedefop, 2021).

Specialized arts programs are IVET secondary education programs that are part of compulsory and formal education and training systems and last for three years. Students must be at least 15 years old and have successfully completed the third cycle of basic education. The specialized artistic programs have two basic school components, general and scientific, although they also include a technical-artistic training component, with practical school and business training. It takes place in a workplace in the form of an internship or occasional work, providing students with the necessary knowledge and work experience. The Artistic Aptitude Test (AAP) comprises the professional performance and practical assessment of the knowledge and skills acquired by the students. Graduates may choose to continue their studies in technological specialization programs or higher education (Cedefop & Directorate-General of Employment and Industrial Relations, 2019).

- **Other VET Programs**

Certified modular training was launched in 2008 for individuals with a minimum age of 18 years old or under 18 years old if already inserted in the labour market. This training is directed at those who have not completed basic or secondary education and do not have the necessary skills to enter or progress in the labour market, allowing them to follow flexible, tailor-made courses of varying length. Obtain a CNQ qualification requires a validation process carried out by a technical commission (Comissão Técnica de Certificação) in a *Qualifica* centre. Progression to post-secondary and tertiary education is possible if students meet the access requirements of the program they wish to attend (Cedefop & Directorate-General of Employment and Industrial Relations, 2019).

Portuguese Courses for non-native speakers respond to the learning needs of migrant citizens, facilitate their social integration, and help them find a job. PLA is provided by public schools, IEFV vocational training centres, and *Qualifica* centres in cooperation with the High Commission for Migration (Alto Comissariado para as Migrações), targeting migrants aged 18 or over (Cedefop, 2021).

Basic competencies courses focus on adults with low-level qualifications, offering them the necessary competencies to enter an EFA program or initiate an RVCC process. Learners are trained in literacy, numeracy, and information and communication technology competencies. Their duration varies from 150 to 300 hours (Cedefop & Directorate-General of Employment and Industrial Relations, 2019).

- **Vocational teachers and trainers**

In VET, there are:

(a) VET teachers must be graduates of an initial teacher training program at the tertiary level, and since 2014, new VET teachers must also hold a master's degree. To become teachers in the public sector, candidates must go through a public recruitment process at the national level;

(b) trainers;

(c) in-company trainers (tutors), who are often employed, selected according to their professional and pedagogical skills, and each can be responsible for up to five trainees per year;

(d) technicians for guidance, recognition, and validation of competencies work in the *Qualifica* centres and must have a higher education diploma and experience (Cedefop, 2021).

- **Incentives for learners and enterprises**

Inclusive VET and equal opportunities are core elements of the Portuguese education and training system to lift barriers to participation in education and training for learners from vulnerable groups or a lower socio-economic background. Since 2010, progress has been made in combating early drop-out from education and training, and financial support is available for students. That support is given in the form of grants and scholarships targeted at students who are inactive or unemployed. Incentives for VET learners can take the form of professionalization allowance, supporting learners during the VET period; study material, fixed according to the economic needs of the learner; training grant, granted to unemployed people aged 23 or more; travel allowance by public transport; housing allowance, granted to learners living more than 50 km away from the VET provider's premises; food allowances, learners receive the same amount stipulated for civil servants whenever the training is equal or longer than three hours; social support for learners with dependants, covering the costs of caring for their dependants while they are attending training; personal accident insurance, for young people, unemployed and inactive trainees attending VET programs or employees attending training on their initiative (Cedefop, 2021).

The most important funding source for VET programs and providers, including enterprises, is the POCH, complemented by some actions funded by POISE. These operational programs are part of Portugal 2020, an agreement between Portugal and the European Commission, which brings together the work of the five European structural and investment funds, including the ESF (Cedefop & Directorate-General of Employment and Industrial Relations, 2019).

The government provides financial support to companies that establish employment contracts with unemployed persons, and those that provide vocational training to employees

benefit from exemption or reduction of employers' social security contributions (Cedefop, 2021).

Due to the Covid-19 pandemic, the government launched an exceptional training plan that allows employers to promote the vocational skills of their employees, intending to help businesses mitigate the challenges posed by the pandemic, ensure their viability and employees to maintain their employment contracts (Cedefop, 2021).

2.4.2 - Impact of the EQF policy instrument on NQFs in Portugal

By examining the impact of European pressure on home education using NQFs in Europe, we can identify the first and second-order changes that the EQF has brought about. Although the field of education is governed by 'soft law,' almost all European countries have established or are in the process of establishing an NQF under the influence of the EQF (Mikulec, 2017).

It is also clear that the success of Europeanisation in NQFs is based on the financial support of the Commission through European funds to member states, the expected economic benefits of NQFs, a standard learning process, and established networks in the European educational space governed by an OMC (Mikulec, 2017).

Although the political and educational traditions of each country are quite different, they all started to develop their NQFs based on the consultation process of the 2005 EQF and its formal adoption in 2008 National Agency for Qualification (ANPQ). In Portugal, the EQF is part of the National Qualifications System, created in 2007 to promote the "achievement of secondary education as a minimum qualification level in Portugal," strengthening the link between general and vocational education with "double certification," thus reinforcing the VNIL (validation of non-formal and informal learning) Mechanism and categorization of vocational courses into modules, but also by preparing National Catalogues of Qualifications (NQC) and establishing quality control mechanisms (ANPQ, 2011).

The NQF was eventually adopted in Portugal in 2010, developing a comprehensive framework where qualifications from general, vocational, higher, and adult education were included. The Portuguese NQF is intended to contribute to improving the standard of the education/qualifications system and the integration of general, vocational, and higher education systems as well as education and training systems (Mikulec, 2017).

The Portuguese NQF adopted an eight-level structure (as is the case of the EQF), gradually increasing from levels 1 to 8, based on learning outcomes based on the same categories of knowledge, skills, and competencies as the EQF (Mikulec, 2017).

Learning outcomes are defined in a very similar way to the EQF definition in Portuguese NQFs, representing a statement of what a learner knows or can do as a result of a learning process. The learning outcomes of a qualification mean what a person with a particular qualification 'should know and be able to do' or 'should' and are tested through (external) examination procedures. In Portugal, learning outcomes are presented as outcome targets, defining the basic knowledge and skills students should possess to achieve basic and upper-secondary education as a set of general competencies and objectives (ANPQ, 2011). The units of competence defined in occupational standards also serve as a basis for the VNIL of adults (Mikulec, 2017).

2.4.3 - Education and Training Monitor 2020 in Portugal

Through the Education and Training Monitor country reports, which present and assess key policy developments at all levels of education in EU Member States, we can track the performance of countries against the objectives agreed upon at the EU level under the European Employment Strategy (European Commission, 2022).

In Portugal, the socio-economic background of students has a significant impact on their academic results, with the gap between advantaged and disadvantaged students in the percentage of low achievers being just below the EU average (26.6% vs. 26.9%). National data indicate that students from socio-economically disadvantaged backgrounds who receive school social assistance (Ação Social Escolar, ASE) have more learning difficulties than their peers. PISA 2018 tests also show that students from socio-economically disadvantaged backgrounds are five times more likely to repeat a year than students with fewer socioeconomic difficulties. Even though the educational inequality in Portugal is not as pronounced as in other EU countries, the disparities between regions and high levels of grade repetition remain key challenges (CNE, 2019).

Portugal has a comprehensive framework for inclusive education, but inclusion remains mainly targeted at students with special educational needs (SEN). Despite efforts made to collect data and evaluate existing programs, the country needs a coherent strategy to

monitor and evaluate equity and inclusion in education. Therefore, strengthening the monitoring and evaluation of inclusive education policies could help further improve their effectiveness (European Commission, 2022).

The OECD national policy review for Portugal, *Strength through Diversity: Education for an Inclusive Society*, assessed how the Portuguese education system deals with diversity and inclusiveness. The review suggests strengthening strategies for monitoring and evaluating inclusive education practices at local and school levels, improving governance through better coordination, promoting synergies and accountability mechanisms, sustaining collaboration, and sharing best practices across different administrative levels of the education system. It also suggests expanding continuing professional learning opportunities for teachers to support the use of support resources in schools and communities (European Commission, 2022).

CHAPTER 3

MEASURES ADOPTED TO MITIGATE THE EDUCATIONAL PROBLEMS CAUSED BY THE COVID-19 PANDEMIC

3.1 - Measures adopted by the EU to mitigate the educational problems caused by the Covid-19 pandemic

The pandemic caused by Covid-19 created the greatest disruption to education systems worldwide. In the specific case of Europe, the greatest disruption experienced was due to the temporary closure of schools. Through studies conducted by various organizations, it was possible to verify that students experienced a loss of learning during this period of closure, which brought negative consequences in the acquisition of cognitive and non-cognitive skills in the short and long term (Di Pietro et al., 2020). As a consequence of the pandemic, European educational governance mechanisms were eventually suspended, giving way to state-centred policies (Grek & Landri, 2021). There was, therefore, a change in the focus of the European Union, which started supporting the Member States in the decisions that needed to be taken regarding the temporary closure of schools (Symeonidis et al., 2021).

Crises, such as the Covid-19 pandemic, end up forcing a policy change due to moments of imbalance, which end up disrupting operational procedures as they set directions for policy transformations. The exogenous or endogenous origin of changes is also an important factor that shapes the intensity of changes brought about by a crisis. Regarding the education sector in particular, exogenous crises can be generated, for example, due to a financial collapse, natural disasters, or a global pandemic. These can alter educational policy, changing the way education is delivered and leading to new educational problems. Education can also be affected by being portrayed as one of the key solutions to the crisis in question, which is often observed within economic crisis management, where education is seen as the key element in addressing social problems such as poverty, unemployment, or social inequalities that crises ultimately exacerbate (Smeyers & Depaepe, 2008; Troohler, 2017 in Zancajo et al., 2022). Endogenous crises in the education sector can be triggered, for example, by dissatisfaction with existing educational provisions, inadequate working conditions, or due to unfavourable performance in international assessments. The crisis generated by the pandemic has elements of both scenarios described since, on the one hand, it is an extra-educational crisis but one that education can help solve. On the other hand, it has also made

clear the limitations of the current education systems in providing quality education (Zancajo et al., 2022).

We can then consider that the crisis was quite destabilizing, but it led to the transformation of education systems. A good example of this is the OECD, which has been very proactive during policy debates on education and conceived the crisis as an opportunity for educational change, which can help governments move forward with new policy reforms (Zancajo et al., 2022).

In education, structural reforms are often difficult to implement due to the differences in interests, beliefs, and motivations of those involved in education. At the global level, paradigm shifts in education are even more difficult due to the large size and economic relevance of the public administration sector. However, the OECD recognizes that the pandemic may serve as an opportunity to align the preferences of all education stakeholders, which are usually more difficult to coordinate (Zancajo et al., 2022).

3.1.1 - The role of the European Union in Education during the Covid-19 pandemic

Education belongs to the "soft" legal competence of the European Union, which means that it can only propose measures, not directives or regulations, of a mandatory nature. It is the ability to achieve a goal through attraction and not through violence and persuasion (Lin & Hongtao, 2017). The "hard" policy of the European Union, on the other hand, results in legislation that member states are obliged to implement. The European Union, in these cases, is involved in the process of establishing educational policies, while the European Commission has a role in monitoring the actual results (Ladrech, 2010 in Symeonidis et al., 2021).

The European Union's interest in education owes much to pressures from the area of employment, eventually expanding the scope of employment policies to encompass education. The crisis caused by the pandemic exacerbated this approach, where education is seen as a means of retraining the workforce and consequently making it more competitive to contribute to a faster economic recovery. To this end, the Commission has mobilized funding schemes to invest in skills, such as the Next Generation EU instrument, which is available to member states to fund policies related to skills upgrading (Symeonidis et al., 2021).

With the crisis caused by the pandemic, this discourse seems even more urgent due to rising unemployment rates and more limited budgets. In order to mitigate these extremely negative consequences, member states eventually introduced labour qualification policies and attracted skilled labour from countries outside Europe (Symeonidis et al., 2021).

The Commission's proposal for the Next Generation EU provides resources to address the economic and social consequences of the crisis, aiming to ensure that the instruments are well used to unlock investment in human capital, promoting equality for all and inclusion. Member States will be encouraged to use EU financial resources to implement national schemes for upskilling and reskilling the workforce (European Commission, 2020b)

As we live in a society where change is certain and increasingly rapid, education has moved to the top of the political agenda as it is crucial to survive and thrive in this changing world. It is no longer enough to equip young people with a fixed set of skills or knowledge; and they need to develop their resilience. Education and training systems need to help students exercise their democratic rights and live in society (Navracsics, 2018).

One of the main goals of Europe's education policy is to ensure that young people receive a high-quality education regardless of their socio-economic status, which, unfortunately, remains decisive for educational success. The digital revolution dramatically changes the way we live, work, and study, and it is estimated that in the future, 90% of jobs will require some level of digital skills. As such, for Europe to maintain a highly skilled and educated workforce, the teaching of digital skills needs to be improved. To this end, the Digital Education Action Plan was created, which sets out concrete ways for education systems to make better use of digital innovation and technology (European Commission, 2020b).

The European Union provides financial and technical support, but the European Commission and Member States agree that more needs to be done to make high-quality education a reality for all. The European Commission's aim is to make learning mobility a reality for all, thus helping Member States to develop the teaching profession and consequently attract the best candidates (European Commission, 2020b).

3.1.2 - Green and Digital Transition

The European Commission ultimately saw the COVID-19 pandemic as an opportunity to develop education and training systems, as it accelerated the digital transformation in education, something that had been underway for some time. It became evident that this specific context provided the opportunity to advance the digital agenda in education, which was "vital for people to reach their potential without leaving anyone behind" (EC, 2020c, p. 20 in Symeonidis et al., 2021). Consequently, the EU needed a paradigm shift that offered a bold skills-for-jobs agenda to drive dual transitions and ensure recovery from the socio-economic impact of the COVID-19 pandemic (European Commission, 2020b).

Thus, green and digital transitions were accelerated, making Europe a space to develop educational policy solutions. Digital technologies enable flexibility and skills transfer, and since the European Union is lagging in this process, it is important to increase innovative performance and competitiveness through a European approach to digital technologies in education (Salajan, 2019)

But it is not only students who have these concerns. Teachers and trainers also need to be better equipped and trained to be more effective in the digital transformation of education (EC, 2020c in Symeonidis et al., 2021). For these and many other reasons, the pandemic is seen by the European Commission as an opportunity for teachers to organize their teaching differently and interact with students in a more personalized way.

The pandemic is also an opportunity for the European Commission to reiterate its intentions to integrate green transition and sustainability into primary, secondary, and higher education and VET (Symeonidis et al., 2021). "Greening" implies the integration of relevant skills and content into educational programs, which can be monitored with the development of a European competence framework on climate change education and sustainable development (European Commission, 2020c)

The green and digital transitions are reshaping how we live, work, and interact. As the EU moves towards a more resource-efficient economy, many jobs will eventually undergo structural change or disappear. Hence, demographic change requires Europe to harness its talents and diversity, generating new job opportunities.

While most of the responsibility for skills policies remains at the national, regional, and local levels, Europe has an important role by encouraging and supporting Member States to

adopt policies that effectively address the two transitions and strengthen the resilience of the economy and society. Another way of strengthening is through the European budget. The Commission's proposal leverages the EU budget to support Member States' recovery and boost the economy through a renewed long-term budget of €1.1 trillion, reinforced by a dedicated temporary "Next Generation EU" instrument of €750 billion. This support offers Member States opportunities to finance policies that improve resilience to economic shocks and the ability to recover more quickly from the recession (European Commission, 2020b).

The European Commission also had to adapt to this new situation by updating its education strategy for the New European Education Area, to be established by 2025, connected with the new budget and the Next Generation EU plan. The European Skills Agenda and the Digital Education Action Plan were also introduced, aiming to improve the resilience of education systems and increase the use of digital technology and learning among Member States (Symeonidis et al., 2021).

The pandemic served as an opportunity for the European Union to rethink its priorities in education, just as was done for the economy. However, established education policies tend to emphasize the contribution of education to building competitive economies and creating skilled workers to produce benefits in the labour market, which is often interpreted as one of the main factors contributing to social inequality.

The drivers of the European Union's ambition for a green and digital transition are skills and lifelong learning to make Europe climate-neutral by 2050 and a world leader in digital innovation (Symeonidis et al., 2021). As such, the European Commission recognizes the deficit of many member states in addressing the challenges of distance learning, with many people still lacking digital skills or attending schools with limited or no digital infrastructure (European Commission, 2020c).

3.1.3 - Vocational Education and Training

Resilience becomes the aim of VET (the main mechanism to respond to the reskilling needs of the European Union, supporting pandemic recovery), together with the notions of sustainable competitiveness and social justice in the pandemic era (European Commission, 2020d).

Since the beginning of European cooperation, VET has been at the heart of the EU project and has become part of the European Cooperation Framework for Education and Training and the European Education Area. The European Commission presented a council recommendation on Vocational Education and Training for Competitiveness, Social Justice, and Resilience, proposing a modernized EU policy vision for VET to equip young people and adults with the necessary skills to thrive in the labour market and support digital and green transitions. It presents principles for implementing this vision, including a focus on permeability with other sectors of education, greater learning mobility, and working in close partnership with employers (European Commission, 2020b).

It also presents a series of actions to be implemented at the EU level to support VET reform, in particular, to improve the digital readiness of VET institutions, for VET teachers, internships, and centres of professional excellence linked to smart specialization strategies and/or regional innovation and growth strategies (European Commission, 2020b).

The COVID-19 pandemic and the related containment measures highlighted the importance of life skills and our ability to adapt, manage change, and care for each other as a community (European Commission, 2020b).

3.1.4 - Teachers and Trainers

Teachers and Trainers were severely affected during the temporary school closure, especially in their psychological well-being (Mari et al., 2021). Those who taught in the most disadvantaged schools suffered the most, as their students had restricted access to digital devices at home. Family support was often insufficient, leading to a decline in the quality of work delivered by students during the school closure. In contrast, teachers who taught in schools with a greater capacity to encourage student autonomy and creativity could cope better with these problems (Anderson et al., 2020). Nevertheless, education recovery is only possible with teachers and trainers, whose competence and professional development are another dimension guiding the European Education Area (EC, 2020 in Symeonidis et al., 2021).

The European institutions published several documents on how to move towards the European Education Area during the pandemic (European Council, 2021; European

Commission, 2020 in (Zancajo et al., 2022), including an entire strategy on digital education making references to the crisis as an opportunity for change. In policies targeting teachers, training is the most apparent European Union action. In addition, there is also a significant concern regarding the shortage of teachers in several countries, which the pandemic has accentuated. To address this problem, the European Union intends to promote initiatives to make the teaching career more attractive and socially valued (Zancajo et al., 2022).

The national recovery and resilience plans submitted to the EU only mention teachers as part of school digitization strategies and do not emphasize policies directly related to teachers. Thus, we can understand that digitalization has ended up monopolizing the focus of attention on education policies in these plans, forgetting the other problems that are associated with the profession and that also need to be addressed urgently (Zancajo et al., 2022). This is why it is so important to equip teachers with the skills needed for the green and digital transition. To this end, and with the primary aim of enabling career progression for education professionals, the European Commission has proposed the development of guidelines for the establishment and national career frameworks during 2021-2022 (European Commission, 2020a).

3.1.5 - Digital Education Action Plan (2021-2027)

The Digital Education Action Plan 2021-27: Redefining Education and Training for the Digital Age (DEAP), published in September 2020 by the European Commission, aims to increase the quality and inclusion of education and training systems and provide skills for all, without exception, during digital and green transitions. Fundamentally, even though the member states are responsible for the content taught, through the instruments provided by the European Union, they can have the support of this organization for the development of quality education and training (National Forum, 2021).

The two strategic priorities implemented through the Digital Education Action Plan were to promote the development of high-performance digital education and to improve the digital skills and competencies of both students and teachers. Each of these competencies comprises specific actions to be carried out by the European Commission (National Forum, 2021).

The crisis caused by the COVID-19 pandemic ultimately facilitated access to effective digital education. The plan then focuses on the long-term digital transition of education and training. It provides a framework to address the crisis and ongoing challenges of digital transformation in education and society (National Forum, 2021).

The plan identifies a series of principles that fall into four areas: **Ethos:** Due to the role that digital education plays in increasing inclusion and equality, the transformation of education to the digital age requires the involvement of the whole of society, leadership, and investment; **Investment:** Investment is needed that leads to improvements, especially in educational leaders, who play a crucial role throughout the process; **digital skills, literacy and competences:** Digital competence should be an essential skill for all, and more specifically, in this case, for educators; **digital educational content:** To increase the relevance, quality and inclusiveness of European education, high-level educational content is needed, and that content should be readily available (National Forum, 2021).

3.1.6 - The establishment of a European Digital Education Hub

A European Centre for Digital Education is currently being set up to facilitate cross-sectoral exchanges in digital education and to enable strategic collaboration between experts in the field of digital education between regions, Member States, and the EU. This centre seeks to address the needs of four national initiatives:

European Network of Experts – Opportunities for networking and peer-to-peer exchanges; European Community of Practice – Enabling collaboration between European and national initiatives; European Digital Skills Ecosystem – boosting data and digital literacy skills across Europe; European Digital Data Ecosystem – networked IT infrastructure and seamless data mobility (National Forum, 2021).

The Digital Learning Action Plan 2021-2027 summarises the current challenges and opportunities: We need to use the lessons of the past years to gradually evolve from temporary remote and emergency-focused learning to more effective, sustainable, and equitable digital learning as part of creative education and training. This transformation of education and training systems requires concerted action as well as investment and political will to move forward in the European Union and at a national level. The transformation of

education and training systems is a fundamental part of the vision of a digitally ready Europe. However, such a transformation will not happen overnight (National Forum, 2021).

3.1.7 – Next Generation EU

It was difficult for the heads of state and governments of European countries to agree on the best way to respond to the economic consequences of the pandemic. However, it most quickly realized that some common borrowing was needed. Some of the countries that were more affected by the pandemic, such as Spain, Italy, and Greece, did not want to rely on the European Stability Mechanism (ESM), which was set up during the last crisis, to raise funds to support member states. Other governments, such as Germany, the Netherlands, and Sweden, argued that governments most in need should be supported by the institutions created for this purpose, i.e., the ESM, and that the support should come with conditions that ensure that governments in need of assistance were better prepared to face future crises (Jones, 2021).

While everyone recognized that some common borrowing was needed, disagreements hampered the whole process. Therefore, when the European Council agreed upon the emergency measures on 23 April 2020, they were seen as an uneasy compromise between both parties but also led to the conclusion that the European Commission would propose a program to fund European recovery from the consequences of the pandemic. With the decision to launch a recovery fund, another round of negotiations began, focusing on the same three concerns, "who would issue any common debt, how the money would be used, and how it would be financed or repaid" (Jones, 2021).

The German government eventually changed its position and agreed to instruct the European Commission to raise money for the financing of the common debt, taking the spotlight off the ESM and creating space for the Commission to propose raising money that would be repaid through the European budget and back-to-back loans. They played a central role in the administration of the EU Next Generation. Funds are available in grants and loans, and the conditions attached to using these funds are strict. The Next Generation EU is temporary, and there are three years to commit the funds, six to spend them, and thirty years to repay them individually or collectively (Jones, 2021).

The next generation of the EU implies three different institutional requirements. The first is that the European Commission can manage the large stock of debt, up to €750 billion; the second is that the European Council agrees to new sources of revenue or increased national contributions to debt financing; the third requirement is that Member States submit Recovery and Resilience plans that the European Commission can monitor through their implementation (Jones, 2021).

The third requirement, where Member States must submit Recovery and Resilience Programs, which the European Commission can accept and subsequently monitor, is the most complicated to fulfil. This is because it is difficult for Member State governments to design programs to spend large amounts of money in such a tight timeframe. For the European Commission, there were also difficulties in collecting and analysing a huge amount of planning information, with an even tighter timetable. The most difficult part of this agreement related to the imposition of spending conditions and the European Commission's assurance that these national programs would meet European priorities in terms of green and digital transformation (Jones, 2021).

Member State governments represented in the Council of the European Union also have a key role in monitoring and enforcing conditions on the funds used by Member States. Member States alone cannot override the authority of the European Commission, but a majority in the Council is needed to support its recommendations.

The Next Generation EU is seen as a symbol of European solidarity and as a complement to fiscal measures at the national level and monetary policy at the European level. In addition to all financial support, the Next Generation EU promises to introduce institutional changes, such as strengthening the European Commission's ability to raise and distribute funds strengthening the Commission's ability to evaluate and support member states' policies (Jones, 2021).

3.1.8 - The digitalization of education systems

With the temporary closure of schools, Ministries of Education, educators, and International Organisations (IOs) were forced to look for alternative ways of delivering education to ensure continuity of learning. The shift to the digital sphere highlighted the deficiency of some

education systems and the differences in access to digital technologies according to the income levels of the country, but also with the different social groups within the country. All this ended up affecting the learning of students, who had to familiarise themselves with a completely different teaching method and deal with uncertainties regarding Internet access and connectivity (Zancajo et al., 2022)

For some International Organisations, such as the European Commission, the World Bank, and the OECD, the pandemic served as an impetus to promote the digitization of education systems, which turned out to be positive, as the structures of education systems proved inadequate for an increasingly digitized world (Zancajo et al., 2022).

Although they have different approaches, the European Commission and the OECD have prioritized digitalisation-related policies in their recommendations to Ministries of Education on how best to return to normality as far as possible and recover from the pandemic. Through the PISA data, the OECD highlighted that most education systems needed to prepare to offer online learning opportunities to students, mainly due to the availability and adequacy of school infrastructure. In order to overcome these challenges, the OECD advocated for increased public-private partnerships and greater involvement of technology companies to advance the digitization of education systems (Zancajo et al., 2022).

In the case of the European Commission, the digitization of education systems has become one of the pillars for Member States when designing recovery plans. To support Member States in the digitization process, the European Commission launched the Digital Education Action Plan (2021-2027), which aims to outline the priorities and policy actions for the digitization of education systems in European Union countries. The plan covers two main areas: implementing digital technologies to improve and extend education and training and digital development among teachers and students. Member States have taken up these priorities outlined by the European Commission in their national recovery and resilience plans (Zancajo et al., 2022).

Alongside policies aimed at implementing digital infrastructure, member states have opted for policy reforms to upgrade digital skills, with much of the investment being directed at teacher training and vocational education as a strategy to reduce educational inequalities and achieve a more competitive economy (Zancajo et al., 2022).

3.1.9 - Performance gap and educational inequalities

Education proved to be one of the sectors most affected by the pandemic worldwide due to the temporary closure of schools by most countries, adopting distance learning as an alternative method. This significantly disrupted the education systems, especially from primary to secondary school. Governments were forced to expand teaching and learning to ensure continuity in the school year. However, the effectiveness of the strategies adopted varied greatly between social groups, with many education systems finding it difficult to reach the most socially disadvantaged students (Zancajo et al., 2022).

During the first wave of the pandemic, the main priority for education policy was to implement school reopening plans, which was quite complicated given the potential adverse health effects and the financial and human resources available (Reimers & Schleicher, 2020 in Zancajo et al., 2022). The second major policy priority for much of the education system was to combat the side effects caused by the pandemic, particularly educational inequalities. In order to respond to these priorities, industrialized countries increased public spending on education, with increased national budgets spent on education (OECD, 2021 in (Zancajo et al., 2022).

Educational inequalities are not something new, however, the pandemic has played an important role in increasing them.

One of the main challenges for the education system during the pandemic is the performance gap between socially advantaged and disadvantaged students, which can have extremely detrimental long-term effects, such as increased early school leaving. The OECD stresses that the increase in educational inequalities should trigger responses in the national education systems to compensate for learning losses and to formulate initiatives that lead to a change of course regarding inequalities between social groups. For the European Union, the situation created by the pandemic was seen as an opportunity to address educational inequalities as a policy problem. The guidelines given by the European Commission to the member states were focused on structural reforms and investments to address these effects in the long term, thus reinforcing their centrality in the educational agenda (Zancajo et al., 2022).

In the case of European Union member states, the problem of educational inequalities present in the Recovery and Resilience Plans presented to the European Commission crystallizes in three main initiatives: increasing access to early childhood education services for the most vulnerable groups, promoting personalized education; and reforming vocational education (Zancajo et al., 2022).

Investments in early childhood education are presented in many national strategic plans as a tool to improve social inclusion by reducing educational inequalities. The second initiative is mainly aimed at developing personalized education and compensatory policies for the most disadvantaged students, for which countries have proposed a wide range of interventions, investments, and reforms. Regarding vocational education, the three Member States with the highest rates of early school leaving (Spain, Portugal, and Malta) have included investments and reforms in national Vocational Education and Training (VET) systems as measures to address the consequences of the pandemic on the educational trajectories of the most socially disadvantaged students (Zancajo et al., 2022).

Although the crisis has increased social inequalities, no new policy approaches have been created to address this problem. This happens because International Organisations' policies in this area are not innovative and do not involve the adoption of new policy instruments. Because the crisis has not led to new forms of educational inequalities, it has only exacerbated the already existing differences between different social groups in the education sector. This meant that key policy actors did not feel the need to change policy instruments and ended up investing more intensively in existing solutions (Zancajo et al., 2022).

3.2 - Measures adopted by Portugal to mitigate the educational problems caused by the Covid-19 pandemic

The Portuguese population was surprised by the COVID-19 pandemic in the early spring of 2020, which turned out to be very problematic, especially for public health professionals and policymakers, who had to take measures in order to mitigate the effects of the pandemic.

The pandemic appeared during the third school period, catching public authorities off guard and forcing a joint effort to face the crisis. Policy measures and instruments were adopted to support schools in mitigating the effects on the education system, which evolved gradually, depending on the progress of the pandemic in the country, until solving confining the entire country through a statement from the Council of Ministers in March 2020, with schools remaining closed until the end of the school year (Costa et al., 2022).

3.2.1 - The initial response of the Portuguese educational system to the pandemic of COVID-19

3.2.2 - Teachers' perception on the policy measures adopted

When schools had to close physically, equity and social justice were particularly pronounced in political discourse, as students who did not have as much access to technological devices ended up being forced to study at home, and some schools even had to provide students with computers.

Regarding the norms on how things should be organized in schools, the professors recognized that there was an extraordinary emergency to focus on the most vulnerable students and distance learning. For them, the right to equal access to learning was a key issue during this adaptation process; thus, the use of digital platforms and applications, such as WhatsApp, Skype, etc., was a great help in reducing inequalities in access to learning and was used by most of the interviewed professors (Costa et al., 2022).

The program, "*Estudo em Casa*," was created by the Ministry of Education in collaboration with RTP (Radio e Televisão de Portugal) and was aired in April 2020. It covered educational content through daily television classes developed by a group of teachers,

divided into 30-minute sessions. Most of the teachers considered it very important for all students, especially the most disadvantaged, since the vast majority of students had television at home, unlike what happens with access to a computer and internet.

In most cases, it was the school that made the decisions regarding which digital platforms to use and what uses they would make of the public television program. There were cases in which schools gave greater emphasis to #EstudoEmCasa, focusing on synchronous classes in the program, where doubts were asked about the classes taught in the public television program, serving as the primary basis for learning, which was very useful for the most disadvantaged students (Costa et al., 2022).

The role played by the Distance Learning Plan (DLP) during confinement was recognized by teachers. The schools developed the plan and put it into practice during the third term. In this way, the school administration developed a DLP due to the temporary suspension of teaching activities in order to plan the most appropriate methodologies, guarantee the right to education of all students, and help the teachers to prepare and understand the platforms that would be used. According to the Ministry of Education (ME), the groups worked on the plans presented to the teachers in March. However, they were improving them until June of the same year, resulting in the DLP consolidating (Costa et al., 2022).

The study made by Costa et al., (2022), had part of its methodology based on interviews with teachers in order to understand what their perception was about the policies established to guarantee equity in teaching. Thus, it is possible to have a better understanding of the actual consequences of the adopted policies.

In the interviews carried out by the authors, the teachers mentioned that several schools had served meals to students with more significant economic difficulties since, often, the meal offered by the school was the only meal they had during the day. Therefore, during the confinement, this measure was fundamental for the neediest students. In addition to the meals provided, many schools welcomed students up to the age of 12 whose parents worked on the front line of combating the pandemic caused by the Covid-19 pandemic, which was an excellent support for students, but especially for their parents.

It should be noted that the political power ended up responding quickly to the crisis caused by the pandemic, given that it was something very new for everyone, and two types of tools were used to reach teachers and students: informative and communicational. The

informative tools consisted of websites supporting schools, providing information on distance learning, as well as providing guidelines on the implementation of DLP and inclusive education. In addition, the public television program and YouTube channels were created, which served as a complement to the classes. Thus, the government offered several resources to help mitigate the consequences caused by the pandemic, suggest strategies, and offer essential resources for distance learning (Costa et al., 2022).

3.3.3 - The difference between the measures taken on public and private schools

The study made by Conceição et al. (2021) compares teacher survey responses from public and public schools in order to understand how the impacts of school closures and the shift to online education are related to students' socio-economic status. In Portugal, socioeconomic differences are strongly associated with the two types of schools, and the pandemic eventually led to an increase in inequalities in education since some students did not have access to computers and the Internet to attend classes. The situation has improved, especially in public schools, where students are primarily from higher-income families.

During the first lockdown, online streaming became widespread, particularly in private schools. The percentage of teachers in public schools teaching online streaming lessons increased from 22% in March 2020 to 89% in May 2020 and from 63% to 98% for teachers in private schools. This was accompanied by an increase in the provision of supplementary study materials from 86% to 98% in private schools and from 83% to 95% in public schools. Although the provision of videos recorded by teachers increased in both types of schools, this practice remained more frequent in private schools, increasing from 27% to 46% between the first two rounds of the survey (Conceição et al., 2021).

On average, it was possible to see a higher proportion of students in public schools without access to computers and the Internet than students from private schools, according to the teachers surveyed. Although the situation has improved over time, some teachers continued to report a large proportion of students without access to computers and the Internet. In May 2020, 52% of teachers in public schools still reported that 10% or more of their students did not have access to a computer and the Internet. In public schools, the percentage was already down to 16.

The survey also asked teachers about their assessment methods, which made it clear that the majority prioritized homework assignments rather than written tests, as was the most usual before the pandemic context. The percentage of teachers based their assessment on written tests was low during the first closure. However, it increased from less than 30% in March-April 2020 to around 35% in May 2020 in both public and private schools (Conceição et al., 2021).

Teachers preferred to use other assessment tools, such as homework, class attendance, and participation, with schools reporting using a more diverse set of tools. Homework was the preferred assessment method, and in May 2020, it was used by 85% of teachers in public schools and 88% of teachers in public schools. Class attendance and participation were the second and third most frequently used methods.

With the start of the academic year in September 2020, face-to-face classes returned. However, even after more than two months of classes, teachers expected the learning recovery to be slow, and this pessimism was more present in public school teachers than in public schools (Conceição et al., 2021).

3.4.4 – Strengthening adaptability and resilience in the context of COVID-19

The pre-existing resources in the Portuguese education system facilitated areas of immediate response when Covid-19 emerged. Regional and local support structures established to support national projects on curricular flexibility and autonomy and digital education were quickly mobilized to support schools and teachers in transitioning to distance learning. Portugal has made considerable progress in recent years in reducing school failure and early drop-out rates. However, maintaining and building on this progress has become more complex as OECD, (2020) international data suggests that school closures can lead to increased drop-out and inhibit transitions between grades and phases. Strong targeted support for at-risk students, both during closure and after school re-opening, is crucial; adapting existing structures, such as the National Program for the Promotion of Educational Success and the Program for Priority Intervention in Educational Territories, to respond to the changed context may be a helpful starting point (OECD, 2020).

CHAPTER 4

THEMES ANALYSIS

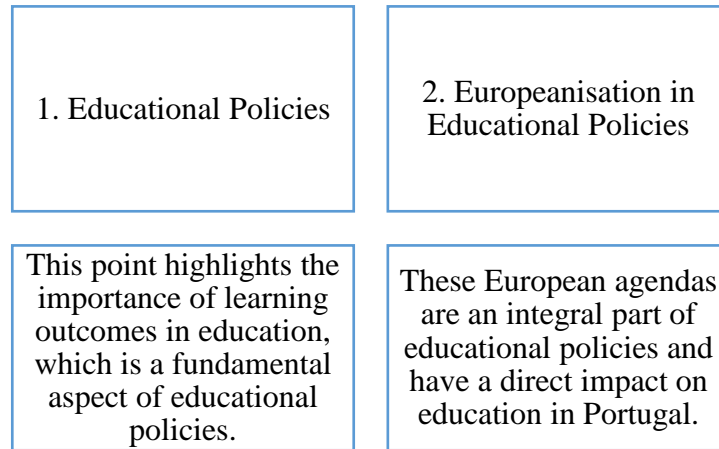


Figure 4.1 – Analysis between ‘Educational Policies’ and ‘Europeanisation in Educational Policies’ made by the author.

Both points address educational policies, their origins, and principles. Point 2 delves into the evolution of these policies over decades, while Point 1 provides a broader overview. Both are related to the European context.

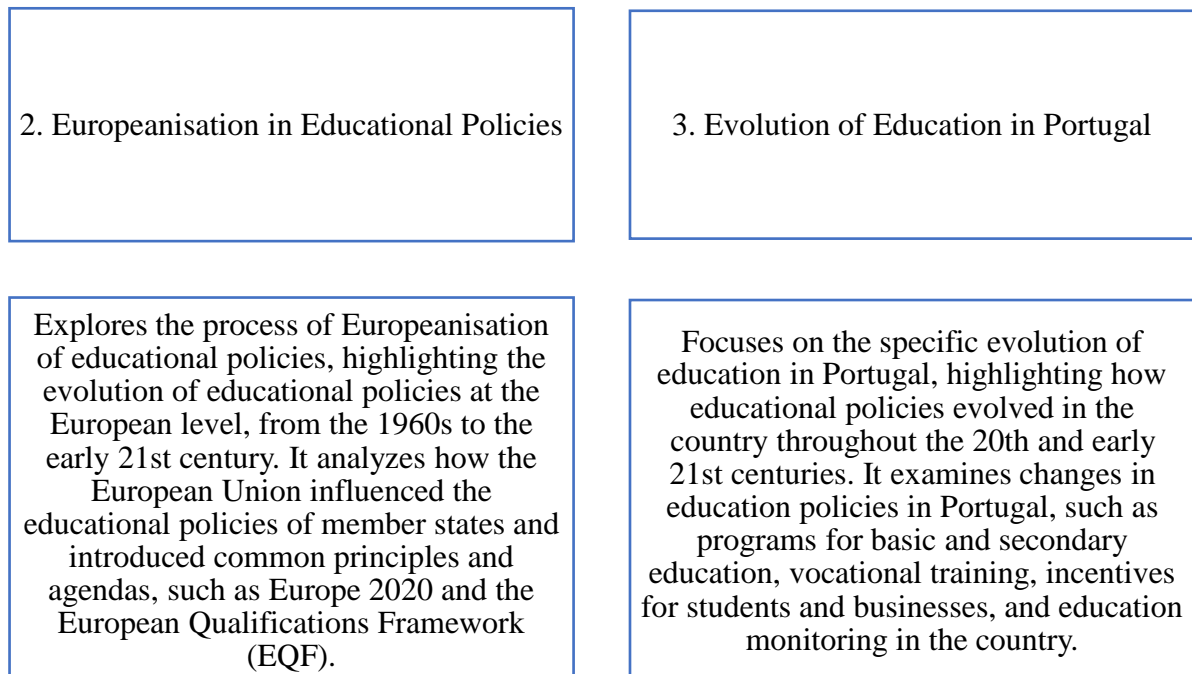


Figure 4.2 – Analysis between ‘Europeanisation in Educational Policies’ and ‘Evolution of Education in Portugal’ made by the author

Both points share the general theme of educational policies but address this theme at different geographical and chronological levels. Point 2 focuses on European influence on educational policies across Europe, while Point 3 focuses on the specific educational policies adopted in Portugal. They provide a broad perspective and a localized and contextualized perspective on educational policies.

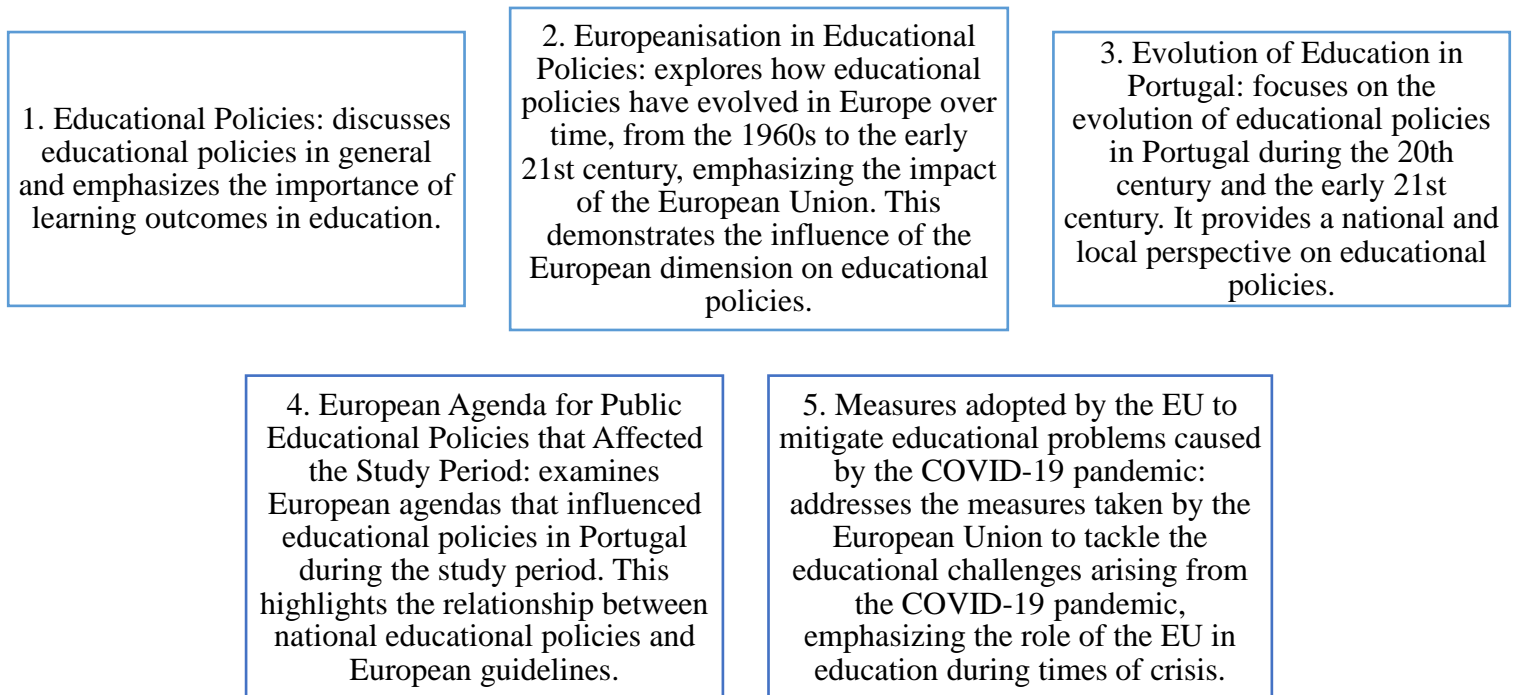


Figure 4.3 – The connection between the different themes, made by the author.

In summary, these points are interconnected by the theme of educational policies, with Point 1 establishing general concepts, Point 2 and Point 3 providing European and national perspectives, Point 4 linking Portugal's educational policies to European agendas, Point 5 highlighting the European Union's response to education challenges posed by the pandemic, delving into the specific role of the EU in this context. They complement each other to provide a comprehensive understanding of the educational landscape in Portugal in relation to Europe and during times of crisis.

Europeanisation is a common thread running through all the points in the paper in various ways

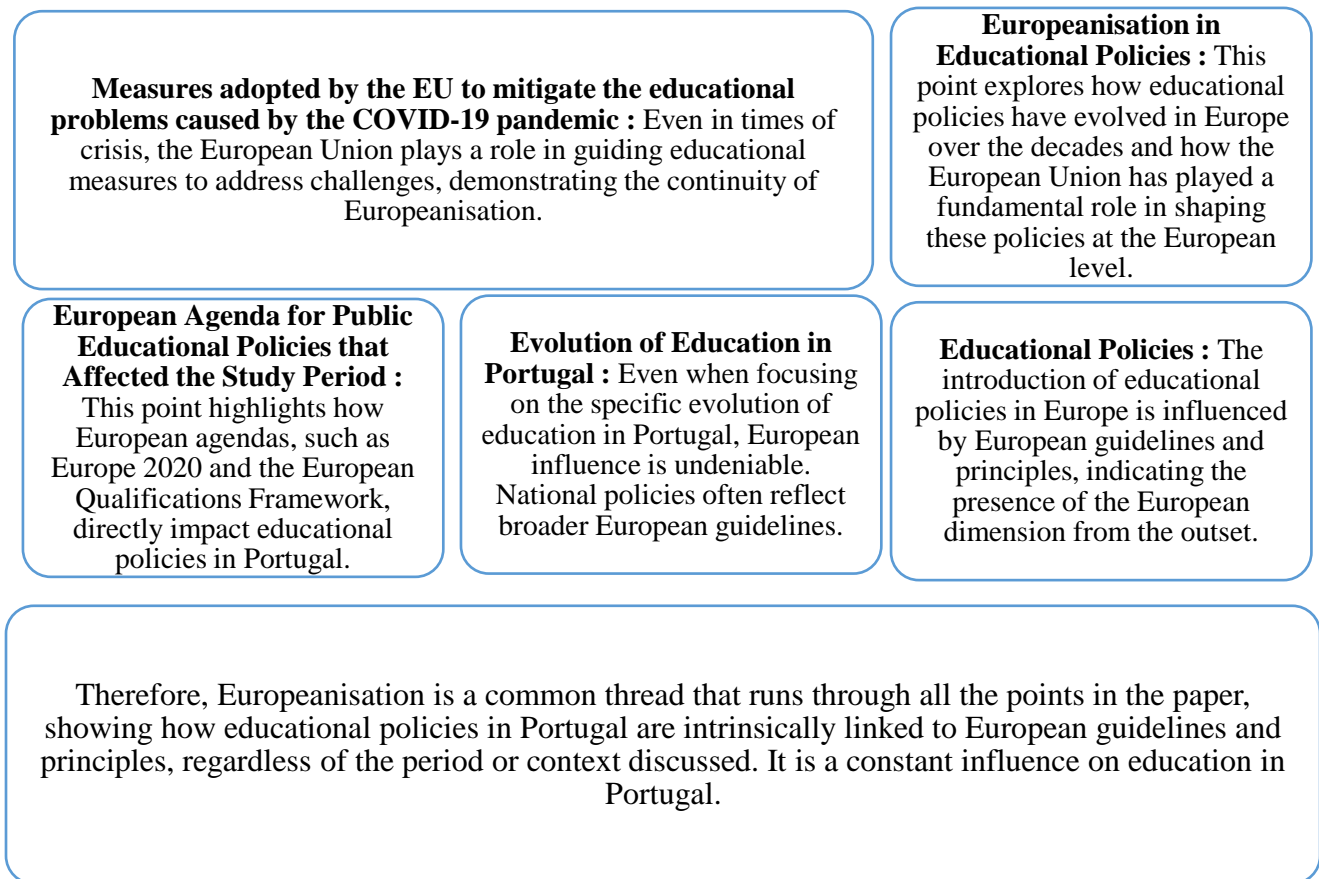


Figure 4.4 – Conclusion of the Themes analysis made by the author.

CONCLUSION

This thesis has explored the impact of the EU's definition of educational policies on the formulation of national policies in Portugal, from 2011 to 2021, including the first two years of the Covid-19 pandemic. Through a comprehensive literature review and analysis of policy documents, this study has identified key areas of influence and challenges in the implementation of EU policy initiatives in Portugal.

The findings of this study suggest that the EU's educational policies have played a significant role in shaping national policies in Portugal, particularly in areas such as curriculum development, teacher training, and mobility. However, the implementation of these policies has been influenced by various factors, including political and social contexts, funding constraints, and administrative capacity.

The Covid-19 pandemic has further highlighted the challenges faced by educational systems in responding to crises and adapting to new circumstances. This study has shown that the pandemic has both accelerated and disrupted ongoing educational reforms in Portugal, with implications for the implementation of EU policy initiatives.

In the context of the COVID-19 pandemic, Portugal implemented significant measures to address educational challenges, with the European Union playing a relevant role in this process. Through its Digital Education Action Plan and other initiatives, the EU supported Portugal in transitioning to remote learning and mitigating the consequences of the pandemic on education. These measures reflect European cooperation and the pursuit of common solutions during times of crisis.

Therefore, Europeanisation has not only shaped educational policies in Portugal over time but has also influenced the country's response to contemporary challenges such as the COVID-19 pandemic. It continues to play a significant role in education in Portugal, promoting collaboration and the search for shared solutions within a European context.

Portugal implemented a range of measures to address the educational challenges posed by the COVID-19 pandemic, with a focus on ensuring equity and inclusivity in education. These measures included leveraging digital tools, television programs, and distance learning plans to facilitate remote education. In addition, efforts were made to provide essential resources, meals, and support to students in need. However, disparities between public and

private schools were evident, highlighting the existing socio-economic inequalities in the education system. In summary, Portugal's response to the pandemic in the education sector reflects the importance of not only addressing immediate challenges but also building a more inclusive and resilient education system. The experience highlighted the need for a concerted effort to bridge socio-economic disparities and ensure equal access to quality education, irrespective of a student's background. By doing so, Portugal can better prepare itself for future crises and continue to promote educational success for all.

Overall, this thesis contributes to the broader debate on the role of the EU in shaping educational policies across its member states. The findings of this study can inform policymakers in Portugal and other member states on the potential benefits and challenges of aligning national policies with EU policy initiatives, particularly in the context of a rapidly changing and unpredictable world. Future research could further explore the long-term effects of the EU's educational policies on national policy formulation and their impact on educational outcomes and social equality.

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