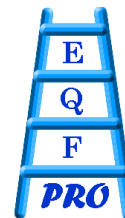


REVISED GRID FOR MICRO LEVEL APPROACH



Cover sheet

Country: Portugal_____

Sector:

X Bank	IT
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Level: EQF Level: 6 NQF Level: _____

Institution (private/state): Universidade Porto – Faculdade de Economia

Name of the study program
: Licenciatura em Economia/Licenciatura em Gestão

Duration
(in years/months): _____ Three years

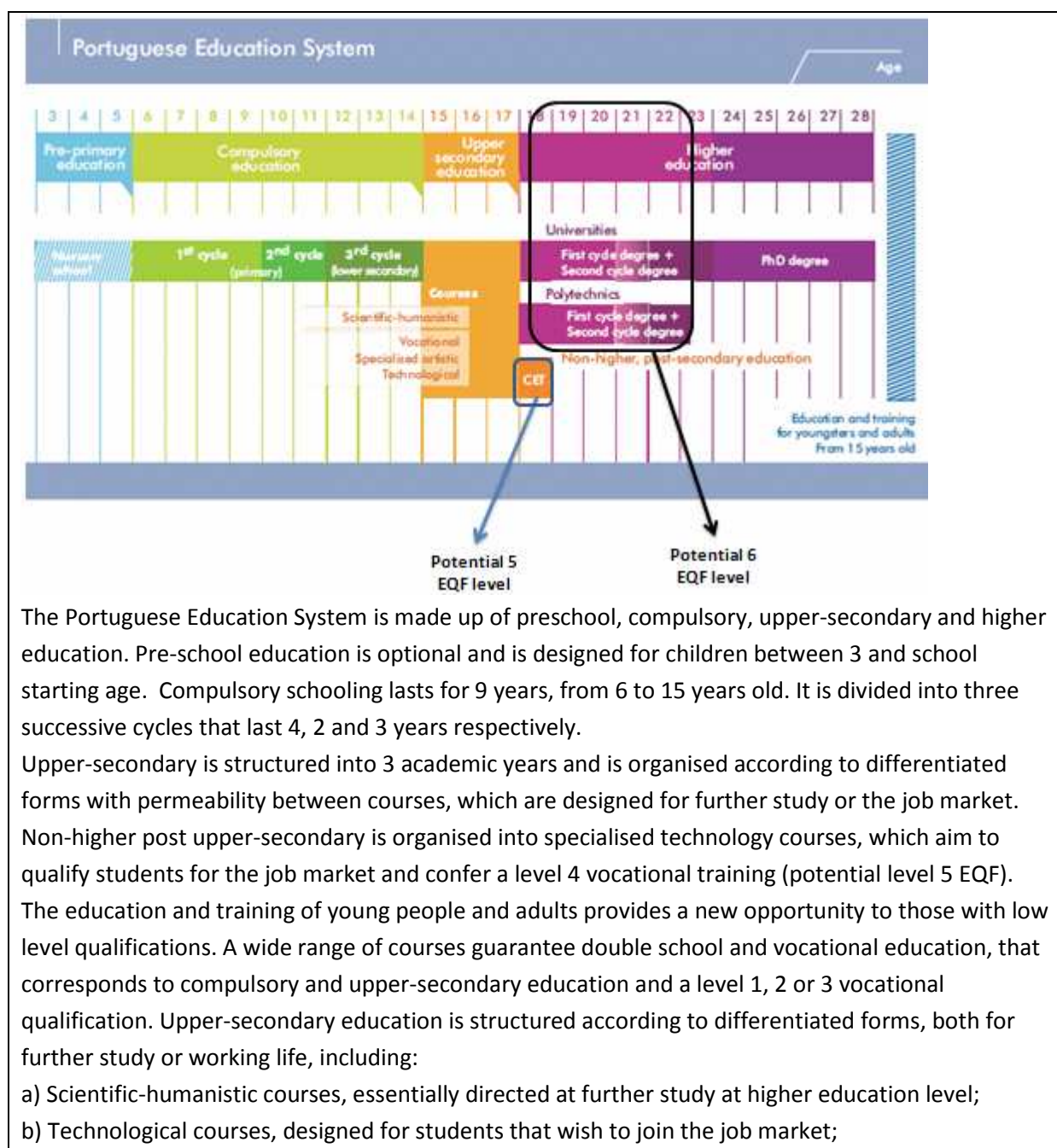
Credits _____ 180 _____

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1) State of play/ macro level

(please provide a short résumé of the macro level grid (1/2 – 1 page), how could the situation in your country be summarized concerning qualifications at Level 5 &6, what is the national context, (what is considered to be HE, how could the learning culture be characterized, etc.)



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c) Specialised artistic courses, organised in order to ensure artistic training in the areas of visual and audiovisual arts, dance and music;

d) Vocational courses are designed for students that wish to join the job market.

e) Technological, specialised artistic and vocational courses allow students to continue studying at non higher post upper-secondary and higher education levels.

All students who complete this level are given a diploma of upper-secondary studies. Technological, specialised artistic and professional courses also confer level 3 vocational qualification certificates.

2) Short presentation of the institution and the selected program

(please provide a short summary about the institution and the background of the selected program you are presenting (origin and history of the selected program, accreditation and building process, etc, core elements of the organisational structure (e-learning, specific modules in the evening, weekend, assessment procedures, etc..))

The University of Porto (U.Porto) was founded on the 22nd of March 1911. It was based on two higher education Institutions created in the 19th Century: the "Escola Médico-Cirúrgica" and the "Academia Politécnica". Presently about 28.000 students (of which more than 3,500 at post-graduate level) study at the 14 schools/faculties (plus 4 other units not equivalent to faculties) that, with a high level of autonomy, are part of the University. Offering more than 60 graduate courses in all major fields of study and more than 120 Master courses, the University employs more than 2.000 teachers (most of which hold a PhD) and 1.200 technical and administrative staff.

Faculdade de Economia do Porto (FEP) is one of the 14 schools of Universidade do Porto. It was created in 1953 and presently around 2500 undergraduate (1st cycle Bologna) and 500 postgraduate (2nd and 3rd cycles Bologna) students. FEP is a national and international renowned school in the field of economic and business science, both at the education and scientific research levels. Beside the Economics and Management courses (whose first cycle of Bologna starts in this academic year, 2008/2009) courses, FEP has a wide offer of postgraduate courses (18 masters and 2 PhD).

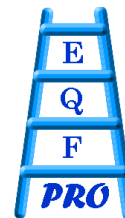
It offers no Technological Specialization (Curso de Especialização Tecnológica, CET), or level 5 EQF, courses. With almost 50 generation of graduates, FEP has over 5000 former students with positions in a wide range of economic activities, especially those related with Banking and Financial Services. Indeed, according to the most recent survey to FEP graduates (GAP, 2008), most of the 2005/2006 graduates are employed in firms of the North Region (83% of total 2005/06 graduates), in the banking and financial sector (34,3%). This regional and sectoral concentration of former students is a common fact observed in all of the seven surveys performed up to the present date.

There are no courses at EQF Level 5. The course chosen is EQF Level 6: Economics and Management

A – Economics

Economics course exists since the creation of FEP (1953). Presently, around 1500 students are enrolled in this course, being recognized by its high quality and employability (according to regular surveys to FEP economics graduates we find that half of them had already a Job before ending his/her course, and 7 in 10 graduates were employed three months after the end of their studies).

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The service sector, in particular banking, is the main employer of FEP graduates in economics and the North Region is the main geographical employment area.

The course is presently adapted to Bologna model, having 3 years duration (6 academic semesters), totalling 180 ECTS. This adaption process was undertaken last year and the academic year of 2008/09 will mark the beginning of the Bologna courses. The plan of studies includes a set of majors in Theoretical and Applied Economics, complemented by other majors, that supply the crucial quantitative basis and also majors on accounting and management. In the last year of studies it is offered a limited set of options/minors, which permit on the one side, an adaptation to labour market demands, and on the other side, a constant attention to recent contributions in the applied economic theory.

The course in Economics has as main goals to provide a strong, solid, and up to date education of scientific basis; to develop the required attitudes and competencies to long life learning, and to offer students opportunities and means for cultural qualification and civic commitment. It constitutes therefore a first coherent education step which continues in post graduation programs (both academic and non academic degrees).

B – Management

Management course was created in 1987 and has around 750 students enrolled. The course is presently adapted to Bologna model, having 3 years duration (6 academic semesters), totalling 180 ECTS. Similarly to the Economics course, the Bologna model will start in the forthcoming academic year (2008/09). In contrast to Economics, Management course includes a compulsory training period performed in a firm/organization which complements academic education and facilitates the integration in the labour market.

Besides a solid formation in the areas of management sciences and economics, this course benefits from the contribution of other majors from social sciences, law, mathematics and computing. The regular surveys targeting management graduates, who are former management students of FEP, reveal a high employability of these graduates – over half of the graduates find a job position before the end of their studies and more than 70% is employed 3 months after their graduation. The services sector, in particular Banks and Consulting are the main employers.

Qualifications in Bank/assurance and IT sectors chosen as case study

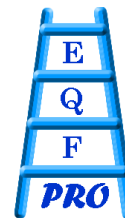
Although Economics and Management courses are quite generic in their scope – they provide high level qualifications for businesses areas in general – the main employer has ever been and continues to be the bank and financial sector.

Link with EQF and NQF if existing, levels in NQF and in EQF

Officially, there is no reference both to EQF or NQF in the description of the courses.

Notwithstanding, L4 NQF, which, according to the description contained in the National Catalogue for Qualification, might correspond to L5 EQF. For this level there is a comprehensive and detailed description of the degree in Knowledge, Skills and Competencies. For levels above L6 the national catalogue does not include any descriptors.

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3) Access regulations/ recognition of prior learning or prior experiential learning

Please describe in full detail

- *Who are the target groups for these programs (traditional students/adults)*
- *What access conditions exist (explaining regulations/procedures/agreements with other institutions, also for 'case by case' practices, role of involved ministries, etc.)*
- *Standards for validation of prior/experiential learning*

3.1. Origin and building process

Economics and Management courses were propelled originally by the need of the market. At the regional level there was no offer (at the time) of higher education courses in the business area. The process of accreditation and modification is undertaken by the Ministry of Science, Technology and Higher Education.

3.2. Objectives

Ordinary entry: students must have completed the secondary studies in the area and obtained positive results in National Exams in Economics and Mathematics.
Special entry: CETs, above 23 years old, transferences of courses – recognition of certifications obtained by curricula evaluation.

3.3. Organisation

- duration: 3 years; full time, face to face classical method (attendance at university); 22,5h contact
- modules or units which are or are not usable in a flexible way: all
- open and distance learning: inexistent (elearning is used on a complementary basis)
- university courses combined with periods in companies, apprenticeship: in Management course there is an apprenticeship period (one semester); in Economics there are no combined periods
- credits: 180
- specific modes for non traditional students: evening courses, week end courses: inexistent
- assessment procedures: students might opt by a continuous evaluation process (several small exams and research paper) or one shot evaluation (final exam).

3.4. Validation of prior/experiential learning

There are no standards for APEL.

3.5. More information

Economics – http://sigarra.up.pt/fep_uk/CURSOS_GERAL.FORMVIEW?P_CUR_SIGLA=LLECO
Business - http://sigarra.up.pt/fep_uk/CURSOS_GERAL.FORMVIEW?P_CUR_SIGLA=LLGES

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4) Relationships with employers and institutions

Please provide detailed information about

- *contributions of companies in programs, equipment, finances*
- *participation of professionals in normal courses, together with academics*
- *university courses combined with periods in companies, apprenticeship*
- *The viewpoint of the employers regarding the described programs (e.g. how is the level of acceptance, attractiveness of the program/the graduates, preferences of certain levels, etc.)*

4.1. Partnerships and contributions

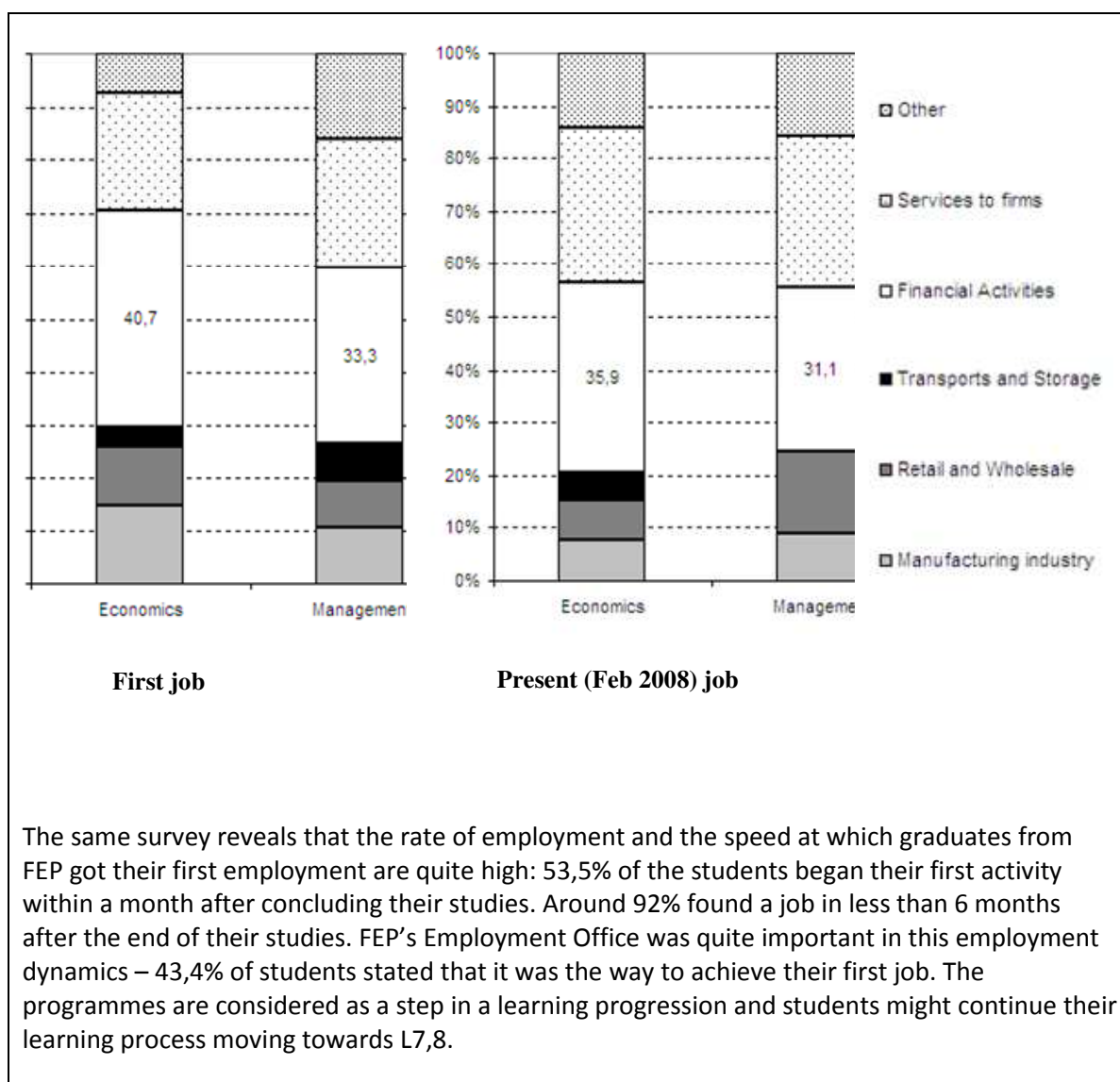
- participation of professionals in normal courses, together with academics
- contributions of companies in programmes
- contributions of companies in equipment, in financing

Inexistent

4.2. Results

Professional insertion: type of jobs occupied by students just at the end of the programme, after 5 years. According to the most recent survey to FEP's former students (2005/06 graduates), 41% of Economics and 33% of Management students had their first employment in the Bank and Financial Sector. By February 2008, a similar percentage (albeit lower) continued employed in the bank and financial sector. 'Services to firms' is another important employer. These two sectors employ around 60 per cent of graduates in Economics and Management.

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5) Current situation regarding learning outcomes

(please describe to which extent and how the presented program is based upon the principals of learning outcomes, meaning the three descriptors of –EQF (knowledge, skills and personal and professional competences) and/or how much the design of the program is representing the content based approach)

The program is presented with no indication of the three descriptors of Learning Outcomes. These characteristics are defined in the Diploma Supplement according to the format of the University of Porto. The course is being reformulated according to the rules of the national accreditation agency that requires all accredited courses to have the LOs described in accordance with the national legislation.

All disciplines of the L6 courses chosen as example for this case study have a description of Aims, Skills and Learning Outcomes. See for instance the discipline Financial Accounting One at

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http://sigarra.up.pt/fep_uk/disciplinas_geral.FormView?P_CAD_CODIGO=1E101&P_ANO_LECTIVO=2009/2010&P_PERIODO=1S. All other disciplines of Economics and Business have this definition. The content of the disciplines is defined in function of the LOs by the teacher responsible. The proposal is validated the academic director and by the school scientific council.

6) Links between the subsystems (vocational, general and higher education)

Please describe

- Which kind of links and bridges exist between the different subsystems?
- Links and bridges existing with other qualifications for access to the programme and for continuity after completion of the programme
- Are these links and bridges negotiated?
- Are they only a form of recognition?
- Are these links and bridges included in a strategy or just happening?
- What are the obstacles (institutional, legal, pedagogical, cultural, and technical?)

6.1. Links and bridges existing with other qualifications for access to the programme and for continuity after completion of the programme

FEP does not offer specialization courses (CETs) (potentially EQF level 5), but is legally obliged to allocate some vacancies for students that came from these levels of studies. In each year (until 16 June) the executive council has to publicize (Edital) the number of vacancies for special entries (older than 23 years old, transference of course, and CETs), which cannot overpass 30% of the numerus clausus (vacancies attributed by the ministry of education, 216 in Economics and 114 in Management for 2008/09). Students that enter using a special application do not have to perform the national exams, which are compulsory for ordinary entries/students. It is therefore recognized their Level 4 NQF (Level 5 EQF).

In the incoming year only one student from CET course applied to FEP. He is originated from an engineering related course, not from a business/bank/assurance related course.

In the case a student from a CET course would come from business/economics area, by the Bologna process, the faculty has to assess whether there was scope equivalence of majors.

There is not direct relation between qualification and sector. Any individual with L5 or L6 qualifications might entry into Bank and Assurance sector.

This is a centralized process that is originated in the Ministry of Education. Nevertheless, the number of vacancies for special entries and the criteria for selecting the candidates is left with the schools. Thus, it might happen that different schools might have different criteria for the same candidates. This might introduce some disparities and differences in treatment depending on the school, which is nothing to do with the level of qualification acquired.

6.2. Obstacles

There is scope for continuity in legal terms, all L4 (potentially L5 EQF) can apply to L6. However, the criteria are defined by each L6 schools, on a case-by-case basis. The admission to CETs is regulated by law in 2006.



Different Ministries are responsible for the L5. L5 can be managed by different Ministries (Education, Economics and Innovation, Employment, and Higher Education), depending on the type of institution that delivers the course. In the case of L6 it is managed only by the Ministry of Technology, Science and Higher Education (MTSHE).

The whole process of continuity L5 –L6 is mostly concerned with the recognition of degrees rather than competencies. At the employer and social levels, there is a preference for individuals with bachelor (L6) to individuals with technological (vocational/qualification) (L5) related degrees.

In the Portuguese context, where the entry into L6 degrees is in general made by competitive national exams, L5 degrees can be seen as an ‘easy’ way to entry into higher education rather than the achievement of a professional degree per se.

The CETs was launched by the MTSHE but the degree can be taught by secondary schools (Ministry of Education), vocational schools (Ministry of Employment and Social Security), technological schools (Ministry of Economics and Innovation), and higher education institutions (polytechnics and universities, Ministry of Higher Education). The Ministry responsible is dependent on the type of institution that delivers the course. L6 degrees are delivery by Polytechnics and Universities.

The problems and difficulties anticipated with the future NQF or with EQF are the lack of awareness at the higher education level of NQF, which difficult the use and diffusion of EQF.

6.3. Competitors in CETs

There are only six Technological Specialized Courses (CETs) in the area of Bank and assurance, which might potential constitute an EQF level 5 degree. Only one (Bank and Assurance) is offered by an institution of higher education located in the North Region - Escola Superior de Gestão, Instituto Politécnico do Cávado e do Ave (Polytechnic education) (<http://www.esg.ipca.pt>, Despacho n.º 845/2007). The remaining are offered by the Instituto Superior de Contabilidade e Administração de Aveiro (Universidade de Aveiro) (<http://www.ua.pt>, Despacho n.º 327/2007), Escola Superior de Tecnologia e Gestão de Beja (Instituto Politécnico de Beja) (<http://www.estig.ipbeja.pt>, Despacho n.º 13417-I/2007), Escola Superior de Gestão de Tomar (Instituto Politécnico de Tomar) (<http://www.esgt.ipt.pt>, not approved yet), Instituto Superior de Entre Douro e Vouga (<http://www.isvouga.com>, Despacho n.º 21463/2008), and Instituto de Estudos Superiores Financeiros e Fiscais (Porto) (<http://www.iesf.pt>, Despacho n.º 14835-AC/2007). All theses courses (excluding the one which was not approved yet) were only legally registered in 2007, which means that their first edition would be in the academic year 2008/09.

The eight higher education Bank/assurance related courses (potential EQF level 6) existing in Portugal are offered only by three entities, all private and from the polytechnic stream: IESF (Porto), Instituto Superior Politécnico Internacional (Lisboa), and Instituto Superior de Gestão Bancária (Porto and, mainly, Lisboa). However, since 1999/2000 the only courses that had students were Bank Management (Gestão Bancária), from the Instituto Superior de Gestão Bancária (The Portuguese School of Bank Management), and Bank and Assurance Management (Gestão Bancária e Seguradora) from Instituto Superior Politécnico Internacional (International Polytechnic Institute), with 819 and 92 students enrolled in 2006/07, respectively.

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The Portuguese School of Bank Management (Instituto Superior de Gestão Bancária, ISGB), was created in 1991 by the Portuguese Banks Association (Associação Portuguesa de Bancos - Portaria nº 915/91, 4th September). ISGB goal is higher education of high level technicians for the financial sector.

7) General reflexive section

Please state

- *What were the challenges in obtaining all necessary information for the case study?*
- *What are your prepositions and recommendations?*
- *What hasn't been said?*

The challenges of obtaining the information dealt mostly with the fact that the structure of the course was not created taking into account the EQF and with the lack of integration of Levels 5 and 6 in the Higher Education structure. The Focus group for this case study helped the definition of the necessary information. These were helpful in the definition of this case study:

- a) Responsible from higher education office at FEP
 - Maria Judite dos Santos Baptista
 - Rui Alves (Professor)
- b) Professors from FEP with experience in the Bank and Assurance sectors
 - Oliveira Marques
 - Costa Lima (Administrator of BPI)
- c) Former FEP lecturers or students that have high positions in the Bank and Assurance
 - João Taborda
 - Miguel Cadilhe
 - Fernanda Mouro Pereira (former Director of BPA, BCP; Executive Director of Ramo Vida)

The prepositions and recommendations are the following:

- a) Promote the importance of EQF among the academia;
- b) Present case studies of good practice;
- c) Involve industry and society decision makers in the process of validating EQF descriptors in HE degrees at all levels;
- d) Use alumni to propose appropriate indicators to validate the descriptors;
- e) Create exchange of staff among European institutions involved in the definition of Los;
- f) Define committees to coordinate the transition between levels of EQF;
- g) Create a observatory to research and recommend EQF application in HE sector.

Thank you!