



Portugal

“Feeding in” and “Feeding out”, and Integrating Immigrants and Ethnic Minorities

A Study of National Policies

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*Disclaimer: This report does not necessarily reflect
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CHAPTER 1

1. Update on relevant key trends and policies

The issue of social exclusion has gained a reinforced visibility in the last months following the President of the Republic's initiative "Itinerary for Inclusion" (*Roteiro para a Inclusão*). This presidential initiative has managed to give a high profile to different dimensions of the fight against social exclusion by the involvement of the media, the different ministries and public entities, and of the several local authorities and organisations working in the territories which have been covered by this "itinerary". The NAPincl process itself has in this context gained an increased visibility, reinforced by the recent presentation of the National Strategy Report on Social Inclusion and Social Protection.

As far as new relevant data is available it is important to highlight the latest figures on unemployment released by the National Statistical Institute (INE) and by the Institute for Employment and Professional Training (IEFP).

According to INE's Employment Survey in the second quarter of 2006 the unemployment rate was 7.3% (7.2% in the same quarter of 2005). Comparing the two semesters' figures (2006 versus 2005) it is possible to observe the following evolution: the total employment had an increase of 1.0%; male employment increased 1.1% and female employment grew only 0.8%; the number of employees increased 2.1% (long term contracts 1,2% and short term contracts 6,2%), 20 000 persons went from self employed to unemployment.

Looking at the information released by the IEFP between June and August, the number of **new** unemployed persons enrolled in Local Employment Centres rose 1.3 per cent (compared to the same period last year) and the **total** number of unemployed persons decreased 5.2 per cent. The total number of registered unemployed people by the end of August was 436.792. Although this figure does not represent any major variation compared to the previous month it represents a fall of 6% compared to August 2005, meaning there was a decrease of 28.096 unemployed people in one year.

For 2007 the Government is estimating an unemployment rate of 7.5%, which is only one percent point lower than the average rate of the second quarter 2006. It is also foreseen the attribution of over one million Euros to the IEFP and an increase of the Social Security budget, given the direct contributions of workers, the combat to fraud and fiscal evasion and the increase in the transfers from the State Budget.

According to the State Budget for 2007 – currently under discussion in Parliament – the Income Tax levels will be updated and indexed to inflation. Employees, pensioners and handicapped people will be the three fiscal categories more negatively affected by this change. According to the Prime Minister in the case of the reduction of fiscal benefits for handicapped people, the idea is to benefit those who are more dependent and with less economic resources. However, in our opinion, what is in effect happening is a suppression of a right which should be associated to the person's condition as handicapped, regardless of his/her salary level.

In this area, the First Action Plan for the Integration of Handicapped People (*Plano de Acção para a Integração de Pessoas com Deficiências ou Incapacidades – PAIPDI*) includes cheaper and more accessible transports, the opening of 400 professional probation courses and 200 professional integration opportunities for people with special needs. The new plan covers to the period up to 2009 and is divided in to three major axes: accessibility and information; education, qualification and labour inclusion promotion; ensuring dignified living conditions. According to the Portuguese Association for

Handicapped People (APD) the Plan *"has good intentions, but there is no plan without budget"*.(Jornal Público in Reapn Press Observatory)

Regarding changes on the pensions system, a lot of discussion has been raised around the foreseen proposals. According to some analysts the main changes – aiming at ensuring the social security system sustainability – in the long run will diminish retirement pension in an unbearable way given several factors: the gradual increase in retirement age; indexing retirement age to the average life expectancy; considering the whole contributory career and not only final years as at the moment; indexing pensions to the previous year inflation (Ricardo Reis in *Diário Económico*, 17/06/06). It has been argued that the changes under way regarding the Social Security Basic Law will imply a reduction of around 20% of the average value of retirement pensions for those who are now entering the labour market. A full account of the revised pensions system will only be possible after the new Social Security Basic Law is approved which will probably not occur before the beginning of 2007.

According to August data, over 225 thousand people were receiving the Social Insertion Income last May (Statistical Bulletin of the General Directorate for Studies, Statistics and Planning of the Ministry for Labour and Social Solidarity).

The issue of over-indebting has been in the forefront of major concerns both among the population in general and among organisations working in the field supporting families. The Government is now creating an Office for the Guidance of Consumers' Indebting, through the Consumer's Institute (IC) and the High School for Economy and Management (ISEG) which will only operate in Lisbon. This office will work in the area of prevention, counselling consumers in credit issues, e.g. loan negotiations, how to revise a spread, interest rates. It will also mediate over-indebting situations and it will collect information on this topic.

On the other hand, from July 2006 credit institutions are obliged to indicate, in all situations, the annual effective and global interest rate in a very visible way.

Finally, some references to undergoing changes in the health and education systems. The present reform of emergency rooms will bring about the closure of 14 services in hospitals has raised an intense public debate and protest from populations and municipalities. According to the expert group who prepared the proposal, the reconversion of local health centres into basic emergency units will ensure that over one million people "particularly in inner country or low populational areas will be closer to emergency services." The proposed network will increase ten times the number of emergency services operating throughout the country, by changes introduced in 24 local health centres. The government proposal is under public discussion.

Other changes will also affect access to health services from January 2007. Hospitalisations in public hospitals – free of charge at the moment – will start to be paid from that date (less than 5 euros/day). This payment will be paid during a specific period and will not be charged in long-term hospitalisations. All those who are currently exempt from paying the so-called moderating taxes (*taxas moderadoras*) will not be affected by these changes (representing 45% of the total users of the NHS).

In the area of education the new Statute of the Teaching Career (*Estatuto da Carreira Docente*) is ready and has been under intense criticisms by trade unions and teachers' associations. One of the main disagreement topics relates to the process of evaluation of teachers. The new process introduces a system of quotas per school for the higher grades (excellent) which means that not all teachers in one school will be able to reach this classification. Teachers' associations contest this quota system whereas the Ministry states that it is not possible that all teachers reach the highest level. At the present moment there is only a Very Good /Good classification.

2. Feeding in and feeding out analysis

The feeding in and feeding out analysis which will be dealt with in the present chapter will on the one hand, assess the way in which Portugal's social protection and social inclusion priorities (as defined in the National Strategy Report on Social Inclusion and Social Protection) have been translated into economic, social and employment policies. On the other hand, it will try to address the possible impacts of the National Reform Programme in terms of achieving social inclusion objectives.

2.1. Feeding-in analysis

2.1.1. Stakeholders' involvement and consultation

In spite of the recognition that the lack of time in the initial phase of the preparation of the NRP (PNACE 2005-2008), affected the involvement of the different stakeholders, according to Arminda Neves (Joint Coordinator for the Lisbon Strategy) *"the measures approved were selected not only because of their relevance for achieving the Lisbon Strategy, but also because of their potential for effective implementation. The Programme was prepared with the active participation of representative people from all Ministries, and the measures were approved by each one of them and the global programme approved by the Council of Ministers."* (in <http://ieei.pt/post.php?post=125>)

In fact, the preparation and monitoring of the Portuguese NRP is based on a network of focal points based in every ministry *"supported by a platform of collaborative work and by a monitoring platform"*. (PNACE 2005-2008) The composition of this network has been established by Resolution 38/2005 of 19th July.

Apart from the involvement of governmental entities the NRP refers the involvement of other moments where it was possible to obtain the participation of other important stakeholders, such as the Social and Economic Council, the Council for Sustainable Development or contacts with several members of the Permanent Council for Social Dialogue. However, according to information for some of these stakeholders there was no opportunity for effective participation in the evaluation of the NRP implementation but only opportunity to formal presentations of the contents of the NRP. Therefore, further efforts should be made in the sense of effectively involve these stakeholders in the monitoring of the Programme's implementation.

On the other hand, there is a clear under-representation of relevant stakeholders in the field of social inclusion, namely the NGO Forum which has gained an increased relevance in the NAPincl governance model¹ and which one would expect to see mentioned in the NRP.

According to the NRP, there were several initiatives all over the country which aimed at promoting the civil society's participation in the implementation of the Programme. Among the 300 initiatives promoted on the Lisbon Strategy only 22 present any connection with the area of Social Inclusion/Social Protection and they are linked with the following areas: health and technology; on-line education and culture; employment; corporate social responsibility; youth; state, civil society and public administration; health and safety in labour; education/training; school absenteeism; handicapped people; social policies activation.

¹ A more detailed analysis of the increased involvement of the NGO Forum in the NAPincl process has already been provided in previous reports.

A space for public opinion was also introduced in the Lisbon Strategy Internet site.

As far as public debate is concerned around the implementation of NRP measures, those which have raised more controversy are those linked to the reform of public administration, the closing down of small size schools and maternities with little operational conditions, the building of the new Lisbon airport and the implementation of the new high speed train. Among the most consensual measures, it is important to highlight the qualification of workers, the support to innovation, research and development and "de-bureaucratisation". It is fair to say that the Technological Plan clearly assumed the strongest media and public visibility.

2.1.2. Social Inclusion/Social Protection challenges

Before commenting on the links between the NRP (PNACE) and the social inclusion/social protection challenges it is important to make some preliminary notes on the whole process behind the NRP and the NSSPSI, namely the political factors involved.

In fact, since the presentation of the current Government's programme in the beginning of 2005 it became clear that there was a concern regarding the links between macro and micro economic reforms followed by reforms in the areas of employment, qualification and sustainability of social policies. These political orientations bring about a closer integration of European priorities, objectives and methodologies. In this sense, the quality of the reporting to the Commission is very much linked to the priority given by the governments on these issues which is by no means detached from their national political trajectories and discourses.

In our opinion, the higher political enhancement given to the current NAPincl by the Government which clearly contrasts with the previous NAP process is clearly linked to these political factors. Nevertheless, in our opinion the Government clearly put a stronger emphasis during 2005 on the Technological Plan, on the Programme for Stability and Growth and on the National Employment Plan than on the social protection and social inclusion process or on environment and sustainable growth.

The analysis of the PNACE shows that there has been a concern to establish a link with the social protection and social inclusion process, namely by recognising that it is vital to integrate the National Strategy for Social Protection and Social Inclusion and the objectives and measures contained in the PNACE. There is a less clear achievement in specifically referring which are the synergies that have been created with the NAPincl.

The document explicitly refers the importance to ensure transversal policies where there is a balance between their economic, social and environmental impact and that the recent approval of the National Strategy for Social Protection and Social Inclusion and the NAP was an important tool to achieve this integrated perspective in the PNACE implementation. Qualification, Employment and Social Cohesion are precisely one of the areas where this articulation is explicitly referred to, both in terms of more global long and mid term strategy and in terms of short-term policies. Incorporating the need to for better social cohesion and for eliminating structural factors that favour social exclusion processes is considered essential for the strategy of growth to be ensured.

Although there is no explicit reference in the NRP concerning the Social Inclusion challenges, they are referred to in several parts of the document and the measures which have been implemented clearly connect to those challenges and contribute to their achievement. Although the NRP does not explicitly identify as an objective the eradication of poverty, many of the measures included in the Report (from education to employment and social protection) will impact on the reduction of poverty and social

exclusion. It is important to stress that all along the document there is a concern to integrate specific measures for specific target groups which are more vulnerable to poverty.

The following paragraphs will provide an analysis of the contents of the NRP taking into account the relevant questions indicated on section 3 of the guidance for the feeding-in/feeding-out chapter.

Although relatively new, the discourse on **corporate social responsibility** has been growing in the Portuguese society. The NRP shows an awareness on this issue on several areas: in the discussions promoted on the topics in several workshops; in the examples of initiatives from civil society which, although not promoted by the Plan, helped achieving its goals (Innovation Prize BES/CGD/PT/CPI and the creation of BES micro-credit) and in specific measures such as FINICIA programme through which 9 local platforms were created. These platforms consist of networks composed by different types of entities such as higher education institutes, entrepreneurial associations and technological centres aiming at providing opportunities for emerging small businesses, by broadening access to micro risk capital and mutual guarantee.

Looking at employment policies, namely the issues connected to the NRP chapter on “Qualification, employment and social cohesion” there is a clear effort of integration of the 3 overarching objectives of the OMC for social protection and social inclusion. Nevertheless, there is in our opinion a clear deficit regarding the mainstreaming of equality between men and women, namely as regards measures to ensure reconciliation of work and family life.

Social Protection and Social Inclusion issues are given clear attention under the scope of the **NRP specific objectives**. Several of them are directly related to poverty and social exclusion and address essential challenges, namely 3.4. foster qualified employment; 4.2. prevent and combat unemployment particularly among young people and long term employment; 4.5. develop the inclusive nature of the labour market, improve social protection and inclusive services.

Gender issues are absent from the specific objectives defined by the NRP, although they are later on picked up in section on the relation between the PNACE and the QREN priorities, namely under the Thematic Human Operational Programme *“essential for intervention within the areas of public and private employment, education and training and advanced training, promoting mobility, social cohesion and gender equality (...)”* (PNACE)

The document also reports on the **measures** that have been implemented under the PNACE, several of which are also relevant for Social Inclusion and Social Protection. In the “Qualification, employment and social cohesion” chapter, after a diagnosis made on the situation – where gendered base data are provided – the report highlights the relevant measures that have been implemented:

- Education, school failure and qualification – designed and implemented in several cases by the concurrence of several ministries. Among these we would point out: the increase in the offer of technological courses; the dynamisation of the system for the recognition and validation of skills; the creation of integrated consultancy programmes for SME; continued training for the active workforce; curricular enrichment; continued training for basic education teachers; the renovation of the *Escolhas* Programme aiming at the reinforcement of the support to social inclusion of children and young people from vulnerable social and economic contexts, namely second and third generation immigrant children.
- Employment – prevention and fight against unemployment particularly focusing on young people, LTU, women, former drug-addicts or those under treatment, handicapped persons, unemployed immigrants and active ageing.

Other essential items for action directly connected to employment and social cohesion are given particular attention under this chapter such as: managing restructuring processes and industrial delocalisation (responsible for unemployment growth); promoting quality, security and security in employment, including questions related to the need for a systematic collection of information on the main labour problems at the national level, the creation of a system of labour mediation which is able to find fair ways to solve problems arising between employees and employers.

One issue we consider that has not been sufficiently clear by reading the document is the lack of any reference regarding the need for an increase of the national minimum wage. Although the NRP includes measures aiming, under the scope of social dialogue, at achieving higher labour quality, security and flexibility that specific factor is not taken into account.

The report also identifies around 90 public initiatives² which have been promoted to present the implementation of relevant measures among which it was possible to identify 19 initiatives, specifically addressing the inclusion of disadvantaged people.

In all areas there has been a growing visibility given to digital inclusion initiatives which has been one of the Government Programme's priorities. The measures implemented include the availability of all the Plans and policy measures in the internet, equipment supply to schools, public spaces and training in ICT or through e-learning, addressed to a wide range of social and professional potential users. Here, too, the NRP pays particular attention to the importance of digital inclusion, among people in disadvantaged situation, namely second generation immigrants.

At a macro-economic level, the PNACE directly addresses the sustainability of health systems and the sustainability of social security. The mobilisation of the social protection system and the promotion of social inclusion are referred to and the document refers that – during 2005 – two main strategic lines were considered:

1. *"a fairer and more effective social protection that is able to face the risks of ageing and adapt itself to new social realities;*
2. *A more efficient system with growing stability and a stronger financial balance, which is more adequate and capable of avoiding evasion and better promoting redistribution answers."* (PNACE, p.36)

The measures which have been put into effect over the last year – newly introduced, changed or reinforced – mainly regard:

- Active ageing
- Protection in unemployment
- Social Protection for people with specific needs
- Support to families

2.2. Feeding-out analysis

The focus put on the impact side of the feeding-out analysis to be performed on the contents of the NRP – clearly understandable and legitimate – imposes a difficulty on which particular attention should be given on future exercises. The NRP implementation report is clear on objectives, targets and measures undertaken, presenting progress indicators for each measure included. It also presents expected results for each measure, but the effective impact of the measures, particularly the nature of the impacts as requested in the guidance for the present chapter is not possible to evaluate on the basis of the

² See Annex D of the NRP.

information provided in the document. On the other hand, the possibility to assess the extent to which some initiatives are effectively benefiting particular groups or pushing people out of poverty implies longer term assessment periods and the utilisation of tools and information (namely statistical) not compatible to the short time framework under analysis.

However, looking at the NRP's objectives and measures it is possible to say that their effective implementation will likely impact on Social Inclusion policies and objectives and several examples have been provided in the previous section. The NRP does refer explicitly to possible impacts on important contributions to achieving the social inclusion objectives. As an example, the issue of the working poor is directly addressed by the PNACE is the labour market segmentation which has direct impacts on the persistence of high levels of working poor. By recognising the consequences of undeclared work on the exclusion of the most vulnerable groups from acceding – at present and in the future – basic social rights, the NRP presents several measures put into effect which try to minimise this situation.

Given this context, the following paragraphs will take a deeper look into the measures presented by the NRP and included in the document's annex and their links to social inclusion objectives.

The first relevant comment regards the PNACE organisational aspects which are presented and which reveal a high degree of monitoring capacity which has contributed to the *“high level of implementation of the measures and policies”*(PNACE, p.1) comprised in the Plan. In fact it is important to highlight some aspects in the strategy for the monitoring of the PNACE measures, namely the creation of a “financial controller” in each ministry, which has the role to detect at an early stage any problems and deviances.

On the other hand, the need to send the information regarding the implementation of the different measures by the different public administration entities within specific time limits and subject to budget sanctions has certainly had a push on effect on the better monitoring potential of the PNACE.

According to the document, the building up of the grid regarding the evaluation of the measures' implementation contained in the PNACE, took into account several dimensions:

- the qualitative evaluation of the so-called contextual measures (*medidas de enquadramento E*);
- quantitative evaluation of the implementation of action measures (*medidas de acção A*);
- budget quantification;
- an analysis table of the current measures and the strategic objectives of the PNACE putting into evidence the way each objective is being achieved.

In fact, according to our analysis of the above mentioned grids the information contained regards the description of the measure, its objectives and expected impacts, the timetable estimated for its implementation, the current situation in terms of its implementation, direct budgeting costs and progress indicators. Further information is given on the nature of the indicated measures (contextual versus action).

A first comment relates precisely to the fact that the Plan does not include progress indicators for any of the contextual measures since they are basically implemented through the creation or change of legislation and therefore their evaluation is merely qualitative and is included in the current situation description. In spite of the specific nature of such measures, it is our opinion that it would be helpful in terms of evaluation to have indicators which would assess the stage of implementation of such measures taking into account the initial estimate.

An overall analysis of the presented grids is summarised in the table below where it is possible to have an overview of the 123 measures presented taking into account the intervention area they are included

in, the total number of measures per each area, the total number of measures with information on budget execution and the total number of measures where progress indicators have been presented.

Intervention domain	Total nr measures	Measures with budget execution	Measures with progress indicators
Economic growth and public accounts sustainability	9-A ³ 2-E	8	1
Governance and public administration	12-A 5-E	12	12
Competitiveness and entrepreneurship	13-A 2-E	9	13
Research, development and innovation	16-A 5-E	10	6
Territorial cohesion and environmental sustainability	10-A 6-E	8	3
Markets efficiency	3-A 11-E	2	2
Qualification, employment and social cohesion	10-A	6	10
• Promoting employment creation ⁴	16-A 4-E	11	15
Total	123	66	62

Looking at NRP grids it is possible to identify a set of relevant measures which, in our opinion, **may have a more direct impact** on achieving social inclusion objectives. These measures are predominantly concentrated in the Qualification, Employment and Social Cohesion domain, although some other relevant measures may be found in areas such as Competitiveness and entrepreneurship, Research, development and innovation and Territorial cohesion and environmental sustainability.

The selection of this set of measures covers four main areas: education and training; employment and unemployment; info-exclusion and support targeting the most disadvantaged people.

Education and Training

- Compulsory introduction of experimental practices in scientific and technical subjects within the Basic and Secondary Education;
- Stimulate vocational training at all levels;
- Rationalise and enlarge the pre-schooling network (including early intervention programmes in the area of health);
- Generalisation of the teaching of English in basic education;
- Promoting young people's and adults qualification through the *Novas Oportunidades* Initiative;
- Reinforcing the education and training system within the scope of long-life learning;
- Promote the qualification and skills certification in ICT;
- Programmes for the professional training and employment integration of handicapped people.

Employment and unemployment

- Intervention programme for young unemployed people under 23 years old;
- Intervention programme for unemployed people with high education;
- Units of Quick and Personalised Intervention
- Intervention programme on active ageing;

³ A – Action measures
E – Contextual measures

⁴ Includes specific targets.

- Implementation of micro-credit solutions and micro-capital risk;
- Intervention programme for immigrant unemployed people;
- Employment programmes of territorial and sector based for diminishing regional asymmetries;
- Modernisation and reinforcement of the employment public service;
- Inovjovem Programme for the insertion in PME (small and medium size firms) of young people with high level qualification, in areas of critical interest for innovation and entrepreneurial development;
- Training and “recycling” of professionals for new activity areas in situations of firms closure (particular emphasis of women's entrepreneurship);
- IGT (General Labour Inspection) programme against illegal and non-declared labour centred on the regularisation of labour contracts for non declared workers;
- Reassessment of the current unemployment protection regime in case of unemployment.

Info-exclusion

- To ensure “broadband” internet connection in all the schools throughout the country; to facilitate the use of computers at the students' homes;
- To modernise public administration by the generalised use of ICT and to create a public offer for citizenship internet.

Support targeting the most disadvantaged groups

- “Inclusive market” intervention programme basically aiming at the building up of individual solutions oriented towards qualifying integration profiles and ensuring a close articulation with answers and complementary supports for vocational training and employment namely in the areas of health and social support;
- Create a network of community proximity services;
- Replacement of the National Minimum Salary – as the updating and calculation reference for Minimum Pensions – by a new Social Support Index and the establishment of new rules for the updating of pensions, which will cease to depend on the political decision, and start to be automatically defined according to the evolution of the economic situation, according to rules which will be established by law.

In the area of **education and training** the focus given on the improvement of qualification both among adults already working and young people who are about to enter the labour market is extremely important. Several of the above mentioned measures aim at facing this long identified problem in the Portuguese society. It is important to point out that the long-lasting success of the measures taken in this area also depends on factors that should, in our opinion, be given the necessary relevance. The education system and the training system need to be better interlinked, there is an urgent need for a closer dialogue (mutual aims, organisational cultures and languages) and for a stronger work at the local level in order to have local organisations adequately prepared to respond to the real problems of the potential learners who given their diversity in age, levels and areas of qualification would certainly benefit from the integrated contribution of both systems.

On the other hand, the introduction of experimental practices in scientific and technical subjects and the generalisation of the teaching of English in basic education may also have a very positive impact on social inclusion, by giving children and young people better qualification tools. However, it is vital that the impact of this type of measures may also be assessed taking into account the quality of learning achieved and not only the number of children/young people/schools attained. Assessing learning outcomes is a key issue and it should take into account not only knowledge but also skills and capacities acquired/developed.

Both the need to integrate the education and the qualification systems and enhancing the quality of learning require a consistent and continued strategy that is not compatible with electoral agendas. This is one of the greatest challenges to be faced in this domain.

Finally, it is important to ensure that the training system is able to overcome some of the problems that have been identified, namely ensuring the adequacy of the training programmes to the needs of the participants in the different territorial areas, to ensure transparency in the selection and dissemination of training programmes and to assess the outcomes of the training programmes in order to improve the quality and efficiency of such initiatives.

In the domain of **employment and unemployment** we would like to highlight those measures that are expected to have a positive impact in the fighting precarious forms of employment. Given the persistence and high incidence of illegal and informal work in Portugal, contributing to high levels of vulnerability and exclusion among the working population, the implementation of measures that help combat this phenomenon are extremely important, particularly when they also achieve the regularisation of existing illegal contracts which is mentioned in the implementation of the measure. Other interesting measure regards the Units of Quick and Personalised Intervention in situations of firms' restructuring or reorganisation directly jeopardizing people's jobs which may help minimise negative impacts on peoples lives deriving from the ongoing process of entrepreneurial "modernisation". In this field, however, it is vital that this intervention arrives at an early stage of the process and not when the firm is closing down in order to allow the search for alternatives and not just to amend an already established situation. The early identification of this type of processes would enable the involvement of workers and trade unions in the process of finding existing alternatives. The *Inovjovem* Programme may also give a positive contribution for the innovation and improved quality in the entrepreneurial capacity of Portuguese firms which is vital in small and medium sized firms but particular attention should be given to the sustainability of such measures in the long-run, by promoting a stronger awareness among employers of the importance of investing in the improvement of their firms' entrepreneurial capacity in areas such as management and products and process innovation. It is not always clear that the motivation for integrating these high qualified young people in small and medium size firms is to achieve or improve innovation, but rather to have "cheap qualified labour". When this happens the outcomes of the programme are not only limited but may be perverse, by enhancing labour precarity through supported programmes. It is thus vital to clearly address and prevent these risks; otherwise, the programme may be confronted to short term and unsustainable impacts limited to the duration of the initial supported period.

The same type of situation is being identified in the case of people with doctoral grants and post-doc grants who are moving from one grant to the other, usually in research institutes with a very little capacity to absorb a large number of researchers in their staff, and who find themselves with no job opportunities in the entrepreneurial sector. In this area too, it would be vital to have a stronger integration of industrial production and scientific knowledge which would have an important impact on productivity. The idea of competitiveness hubs (*Polos de Competitividade*) – which has already been discussed by the Government – where the connection between university/research and industry would be promoted could be an important step towards achieving more effective outcomes in this area.

The impact of measures in the domain of **info-exclusion** in achieving social inclusion objectives in Portugal may be limited by the actual level of qualification among the Portuguese population, where there is still low level of school achievement and high levels of illiteracy. The impact of those measures may be important for a considerable number of people who have actual access (in its broad sense) to information and Internet, but for many other the priorities in terms of social inclusion objectives should be focused on different dimensions.

The introduction of the broadband Internet connection in schools is an important step, but further attention should be given to the training of teachers in using this new facility and the purposes for which this should be used for educational purposes.

Finally, among the measures selected under the **support targeting the most disadvantaged groups** we would like to stress the potential impact of the changes introduced regarding the National Minimum Wage which will no longer be used as a reference for the update of social support measures (namely pensions). These new orientations will allow the National Minimum Wage to be updated on the basis of economic and social criteria and no longer depending on the annual state budget. In fact, the National Minimum Wage has had a continuous deterioration since 2000 (in 2001 the NMW represented 51.5% of the average salary and in 2005 it only represented 46.3%) with all the negative consequences this situation represents for the living conditions of workers and their families. The change now proposed may, at the same time, represent an important opportunity for diminishing inequalities and ensuring more adequate minimum incomes for low wage workers. On the other hand, the creation of a specific Index for Social Supports should also contribute for an adequate updating of these supports according to clearer objectives and criteria. In this area, too, discussion between the Government and the Social Partners will probably bring about some adjustments to these proposals during the following months.

There is clear potential within the NRP to impact on Social Inclusion policies and objectives. At this stage of implementation and resorting to the tools available it is not possible to assess whether the foreseen measures have had an impact (benefiting or not) people or groups at risk of poverty and social exclusion. An effective assessment on impacts would clearly need to collect the direct input from beneficiaries of the different measures and programmes at different stages of implementation, which among other things implies a longer time perspective.

CHAPTER II

1. The integration of immigrants and ethnic minorities

Foreword

Before initiating the chapter on the integration of immigrants and ethnic minorities it is important to make a short reference to the collection of statistical data in this particular domain.

In Portugal, it is not allowed to collect any statistical data on ethnic or racial characteristics, which means that the available official statistics only refer to the nationality of the individuals. Thus, there is often an under-estimation of the presence of population who had a migration trajectory but who in the meantime acquired Portuguese nationality. The same applies to the gipsy population living in Portugal who are Portuguese nationals. The quantitative expression of the so-called "second generation" immigrants is somewhat lost in the statistics. Although these individuals did not start any immigration trajectory, they have been clearly exposed to its consequences. The resource to specific data shows us the numeric weight of these second generation immigrants, which some authors (Machado, 1994) have called the "new luso-africans": at the beginning of the 96/97 school year 36 220⁵ children of African origin were enrolled in the basic and secondary education, which corresponded to 2.8% of the total school population in Portugal. In 2000/2001, the percentage of children of African origin in the Portuguese schools had decreased to 1.70%. The analysis of the data by education level shows that the percentage of children of African origin in the Portuguese schools was 1.90% in the basic education and only 0.93% in the secondary school.

⁵ Data provided by Entreculturas.

The present chapter will therefore try to resort to different sources of quantitative and qualitative available data in order to present an overview, as comprehensive as possible, on the issue of immigration and ethnic minorities.

1.1. Migration patterns and trends in Portugal: general overview

For decades Portugal was mainly a country of emigration towards Europe destinations. Nowadays, the Portuguese society is characterised by a double pattern of migration flows.

In the European context, the migratory dynamics in Portugal showed, to a certain degree, characteristics similar to those of the other Southern European countries, who went from being countries of massive *emigration*, to a mixed situation, where *immigration* acquired relevant proportions, both in quantitative terms as well as with respect to the social problems it generates.

In spite of the historical coexistence of inflows and outflows of population, there was a significant change in the patterns of migration movements in the mid 1970s. The reasons behind this change are both national and international, namely: the decolonisation process which followed the 1974 Revolution, the world oil crisis in the 1970s, the integration of Portugal in the (then)European Community and later the Schengen Agreement, the globalisation process and the economic, political and social changes in Central and Eastern Europe.

The major metropolitan areas of Lisbon and Oporto, followed by other urban centres, have traditionally been the preferred destination of migration movements in Portugal. Following a first period of internal migration from rural (inland) to urban (coastal) areas, an influx of African immigrants, particularly from Cape Verde, represented the first expressive migratory influx which would compensate the massive Portuguese emigration to other European countries to work in certain sectors of the labour market, especially construction, as well as the mobilisation of the Portuguese male population to the Colonial War. This first influx of migration was in fact *substitution immigration*, promoted by the Government itself in order to face the lack of workers in public works and construction.

During the 1970s, migration flows are intensified and diversified. It is possible to identify four external flows: *immigration*, *emigration*, *repatriation of emigrants*, and *return from former Portuguese colonies*. At the present moment, only the latter one can be considered totally concluded and the population involved fully integrated in the Portuguese society. The other three remain ongoing processes.

Apart from the hundreds of thousands of Portuguese residents in the former colonies (some born there) who returned to Portugal, a few thousands of Africans came to settle in Portugal during that period. Different circumstances concurred to this immigration flow of both refugees and economic immigrants: the decolonisation *per se*, the profound political and ideological changes, political instability and civil wars – all within a context of a gradual and seriously deteriorating economic context in their countries of origin.

After the mid 1980s there is a decrease in the intensity of the immigration flows registered during the previous decade and at the same time there is a clear increase in labour migration. Immigration from Cape Verde, was consolidated, and the phenomenon was extended to other former African colonies, in particular Angola and Guinea-Bissau. Brazilian immigration was stepped up at the same time.

According to data from the Service for Borders and Foreigners' (SEF) the number of foreigners legally residing in Portugal went up from 20 514 persons in 1960, to 177 774 in 1998, which represents an increase of 766.5%. Briefly, between 1992 and 2002, the percentage of foreigners in the total

population living in Portugal rose from 1.3% to 4%, which is slightly higher than the relative presence of immigrants in other southern European countries, like Spain (3.1%) or Italy (2.6%), but considerably lower compared to countries like the UK (34.5%) or Luxembourg (38.1%). (SOPEMI, 2004)

Three main factors have been attributed to this rapid growth of labour migration (Machado, 1994): the stepping up of public works programmes (a sector traditionally highly dependent on migrant labour); the loose Portuguese policy on immigration, during the 1980s at a time when other European countries, which had traditionally played host to immigrants, imposed strict restrictions on the entry of non-EU nationals; the creation of migration networks in the host country.

In the last years of the 1990s, there was a new change in the immigration pattern in Portugal. African immigration from the former colonies continued, but Brazilian immigration increased, at this time with a more skilled profile, and more specifically, a new front opened up from Eastern European countries, which only appeared in official statistics later (Machado, 2002).

The total number of foreigners with “**legal residence**” status in Portugal with reference to the year 2000 was of 207,607. Their distribution by nationality is given in Table 1. African countries continue to provide the major group of immigrants, although the latter come in large part from former Portuguese colonies. Of these, Cape Verde in and of itself accounts for the largest proportion of persons with legalised residence status (22.7%)

Table 1: Foreigners with legalised residence status in Portugal – 2000

Nationality	Number	Percentage
European countries	61709	29.7
<i>EU countries</i>	<i>56859</i>	<i>27.4</i>
Africa	98754	47.6
<i>From countries where Portuguese is the official language</i>	<i>93491</i>	<i>45.0</i>
America	37620	18.1
Asia and Oceania	9247	4.5
Others	277	0.1
Total	207607	100

Source: INE, in REDITEIA, Nº 27, April-June 2002.

However, if one looks at the number of foreigners with “**stay permits**”⁶ two years later (total of stay permits issued up to 5 March 2002) it is possible to see the growing presence of immigrants from Eastern Europe (80 881 permits in a total of 147 515 permits issued up to March 2002). Ukrainian nationals represented the largest group of immigrants with stay permits (35.6%), followed by Moldavia and Romania (7.3% and 6% respectively). On the whole, Eastern Europe immigrants concentrated 55% of the total stay permits during this period. Brazil is the non-European country which presented the second highest figure of stay permits granted, coming immediately after Ukraine (18.5%).

The data⁷ regarding the number of foreigners who have been granted either a residence permit or a stay permit, between 2001 and 2004, shows Brazil as the leading country (14.9% of the total), followed by Ukraine (14.7%) and Cape Verde (...).

⁶ There is a distinction between “legalised residence” and “stay permit.” The latter was created by legislation in 1991 and requires a valid contract of employment. In practice, the “stay permit” corresponds to a temporary status of authorisation to work, and does not confer the right of residence as such.

⁷ SEF (2005)

The analysis of the regional distribution of immigrants in Portugal, by nationality, reveals different patterns of settlement: Eastern European and Brazilian immigrants are dispersed throughout the different regions in a somewhat balanced pattern, whereas African immigrants are clearly concentrated in the Lisbon and Tagus Valley region.

By the end of 2005 there were 276 40 immigrants living in Portugal under the scope of the residence permits and another 183 833 immigrants under the scope of the stay permits. According to the new legislation there will only be one kind of permit – residence permit – and therefore the former stay permits (yearly renewable up to now) will be replaced by residence permits.

According to ACIME, there are around 500 thousand legal immigrants in Portugal at the moment and the overwhelming majority of them are in the active age group and effectively working.

As far as illegal immigration is concerned, the available estimates vary between 80 000 and 100 000 people (data provided by immigrants associations to the media). According to the Borders and Foreigners' Services, the police forces have identified 1 061 illegal citizens during the first semester 2006, comparing to only 512 individuals who had been identified in the first semester last year.

1.2. Legislation and State intervention

"As regards specifically the regulation of entries, it can be said that up to the beginning of the 1990s, the Portuguese State essentially lacked any policy. Better yet, the immigration policy was dictated solely by the economic principles of the needs of a labour market with a high deficit in manual labour, especially in construction and public works, at a time of a vast programme of expanding and modernising infrastructures and facilities throughout the country. The fact that up to the mid 1980s, the percentage of foreigners was small, will moreover have contributed to delaying the political perception that the country had gradually become a destination for labour migrants." (Machado, 2002)

By the end of the 1980s the increase of inflow labour migrants and the new European guidelines on immigration (namely the Schengen Agreement) pushed Portuguese national authorities to politically assume the need to define a legal and institutional framework in this area.

Partly as a consequence of this long lasting omission, in the beginning of the 1990s, there was a high proportion of *immigrants without legal residence status*. This new political awareness would elicit various *extraordinary processes to legalise* such situations. The lack of legal status together with precarious forms of integration in the labour market created difficulties for the social inclusion of these immigrants.

By the end of 1992, beginning of 1993, the first process to legalise the situation of clandestine migrants was launched, reaching some 40,000 individuals in all (Marques et al, 1998), most of whom from the PALOP (African countries where Portuguese is the official language).

Between 1993 and 1996 (the latter being the year of the second extraordinary process to legalise clandestine migrants) *"new nationality, asylum and aliens acts were published, that were more restrictive than the previous versions as regards the access by migrants to the national territory and to Portuguese citizenship* (Malheiros, 1996)." (Machado, 2002).

On the other hand, the post of High Commissioner for Immigrants and Ethnic Minorities (known by the Portuguese acronym ACIME), created in 1995 by the Socialist government, in response to the acknowledgement of a need to implement social integration measures for immigrants from a

multicultural perspective, proceeded to play the role of privileged intermediary between the associations of immigrants and the government. At the present moment, ACIME concentrates most governmental measures relative to the integration and support to immigrants.

In 1996, a second extraordinary legalisation process was launched, this time coordinated by ACIME, and integrating, for the first time, a representative element of immigrant associations in the respective National Legalisation Committee.

This second legalisation process gathered some 35,000 applications, the large majority of which once again came from immigrants from African countries where Portuguese is the official language.

The years which followed were marked by measures to ensure a growing participation by immigrants in issues concerning political rights (through the initial participation of immigrants in local elections in 1997), as well as the strengthening of structures for mediation between the State and the associations (example of the Advisory Committees of Ethnic Communities and Migrants at local level).

During this period it is important to highlight three legislative initiatives: in 1998 a new law approves the concession to immigrants of the right to family regrouping (Law nº 15/08); in 1999 a new law is approved against racial discrimination (Law nº 134/99) and in 2000 new legislation for the concession of working permits to illegal immigrants (IGT 2000/09/08).

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In 2001 a new process of regularisation for the granting of temporary stay permits takes place. This regularisation process is open to all those who, coming from outside the EU, have arrived in Portugal before the 30th November 2001 and at the same time have a labour contract. This new process was subject to fierce criticisms by NGO's and by political opposition parties: on the one hand, the eligibility criteria were ignoring all those persons who were working in Portugal without a labour contract; on the other hand because this type of exclusion criteria were favouring the already – flourishing – mechanisms of illegal working, seriously deteriorating the hosting and integration conditions in the Portuguese society for all those who were already living inside the territory.

The total number of staying permits varied from 126 901 in 2001 to 47 657 in 2002, which represented a negative decrease of 62.4 percent points. Immigrants from Eastern European countries represented in 2002 over 50% of the total permits. Brazil is the second country (after Ukraine) which concentrates the higher number of staying permits granted in 2002 (11 373 individuals).

In 2004 a new extraordinary legalisation process was opened (*Decreto Regulamentar nº 6/2004*, of April, 26th, regarding Decree-Law nº 34/2003, dated February 25th) for all immigrants who, among other requirements: made their pre-enrolment within a period of 45 days; had come into Portugal before the 12th March 2004; had been employed for a period of 90 days, before March 04; present proof regarding their housing situation; criminal records issued in Portugal and in their country of origin; a labour contract or a promise of a labour contract. Among the 53 000 illegal immigrants who made their pre-enrolment, only 3145 (up to October 2005) managed to conclude the process. To these 3145, another 7200 candidates would be added – accepted under a special regime organised by ACIME or under preparation – regarding all those who, although not having a labour contract or made any contributions to social security could not be held responsible for the non compliance to duties that should have been fulfilled by their employers.

From last September, the legalisation process initiated in 2004 has been re-opened and, under the scope of the Lula Agreement, Brazilian citizens (6520) who had enrolled back then will finally have residence permits. Immigrants from other origins who had also enrolled in 2004 will also be able to finalise their legalisation process. From September 06 onwards, the Borders and Foreigners Service will contact these immigrants in order to grant them a temporary staying permit for 90 days, time during which they will have to prove they are engaged in a labour relationship. After this link is established, the SEF grants a temporary staying permit with authorisation for work, during one year. Within this period the legalisation process will take place.

In August 2006, a new Immigration Law was approved. Among the main changes which were introduced it is important to highlight the fact that the local authorities now have the competences to renew residence permits to foreigners who are living in Portugal. Children and young people who were born in Portugal, stayed illegally and who are enrolled in school are eligible for the concession of a residence permit with no need for a visa the same applying to the parent(s) who is effectively in charge of these children.

The scope of family regrouping is also enlarged to immigrants who are couples living apart together, i.e. those immigrants whose partners are still staying in their origin countries. The decision delay has been shortened from six to three months.

A temporary staying permit has now been introduced addressed at seasonal employment.

The new law has also made compulsory the drafting in an understandable language (for the foreign citizen) of the communication regarding the decision to refuse his/her entry into the country; this communication has to be sent to the diplomatic representatives of the country of origin

As far as sanctions are concerned arranged marriages will be considered crime and monetary sanctions to employers who hire illegal immigrants will be increased.

The Forum of Catholic Organisations for Immigration (FORCIM) which comprises several organisations⁸ has reacted during the public discussion of the new law issuing a document based on the field experience of the signing partners. According to their opinion the new legislation intends to *“regulate rigorously the entry, permanence and exit of foreigners. In the legal texts there is a detailed forecast regarding the entry, the exit and how to expel foreigners. However, very little is said about the permanence in Portuguese territory, almost only some bureaucratic details as far as documents renewal is concerned. It is obviously, a consequence of the light attitude which has characterised the*

⁸ Associação “O Ninho”;
Caritas Portuguesa;
Coordenação Nacional dos Imigrantes Ucranianos;
Capelania dos Imigrantes Africanos;
Centro Padre Alves Correia;
Comissão Episcopal da Mobilidade Humana;
Comissão Nacional Justiça e Paz;
Comissão Justiça e Paz da Conferência dos Religiosos Portugueses;
Fundação Ajuda à Igreja que Sofre;
Fundação Evangelização e Culturas;
Liga Operária Católica – Movimento de Trabalhadores Cristãos;
Missionários de S. Carlos/Scalabrinianos;
Obra Católica Portuguesa de Migrações;
Rede Hispano-Lusa das Mulheres Vítimas de Tráfico;
Secretariado da Pastoral de Migrações do Porto;
Secretariado da Pastoral de Mobilidade Humana de Beja;
Serviço Jesuíta aos Refugiados.

Portuguese state's attitude regarding the gradual and full integration of immigrants as well as that of refugees. Even in a mere juridical perspective we are far away from the absolute equivalence (to the exception, although mitigated, of political rights) foreseen in the Constitution". (Obra Católica Portuguesa de Migrações <http://www.agencia.ecclesia.pt>)

It is important to recall that the Portuguese Constitution establishes the principle of equal treatment between nationals and foreigners, according to which immigrants can exercise all the rights of Portuguese nationals and be subject to the same obligations.

Article 83° of the new law describes the rights which are granted to those entitled to residence permits: education, work, professional training and health. However, according to the above mentioned Forum *"it is essential that the State which is now proclaiming such rights is able in the daily activities of their bodies and agents, to respect and to enforce respect for those rights (starting by the necessary regulation of the new Law)". (Obra Católica Portuguesa de Migrações <http://www.agencia.ecclesia.pt>)*

Another criticism is related to the total absence in the new law of any reference to the civil society organisations, in spite of their responsibility as regards intervention with the immigrant population. The State is often resorting to these organisations for the support to this population, particularly to those who are in the most marginalised situations (e.g. the homeless and unemployed immigrants, and undocumented immigrants".

In spite of the criticisms, there has been, in our opinion, an effort to diversify and to increase the quality of the services that are being offered to immigrant populations in recent years and the role of ACIME has clearly been a driving force in the promotion of different activities and the involvement of multiple partners.

1.3. Employment issues

The Portuguese Constitution recognises the *right to work* to all workers, without distinction of nationality or territory of origin. Consequently, in theory, all immigrants are entitled to adequate remuneration for their work; to a weekly rest; to a maximum limit off the work day; to unemployment benefit and social protection for maternity, old age, illness and death.

For those who emigrate for economic reasons, finding work is perhaps the primary concern, since it is through employment (at least after the departure) that the expectations of a better life can be achieved. Nevertheless, these expectations do not always seem to be covered in a satisfactory manner. Thus, in order to understand the high risk of poverty faced by these populations it is essential to analyse the conditions under which their integration into the labour market is being achieved.

Immigrant communities have, on the whole, high levels of activity. Nevertheless, their integration in the country's economy is essentially made through their participation in the secondary labour market – a market with lower wage levels, where regulated contractual practices are virtually non-existent and where the "lack of social protection" grows in case of unemployment or illness.

The occupations which they carry out and the sectors in which they are integrated, are therefore less attractive for the Portuguese and those offering worse conditions and lower wages: *"most of the men (59%) work in construction, and to a slightly lesser extent, in trade, transport and warehousing, in sanitation and cleaning and in other processing industries. For their part, women concentrate on personal and domestic services (52%), and are present also in activities connected with hotels and restaurants, sanitation and cleaning, trade and retail and social services"* (Perista and Pimenta, 1993).

Several authors have shown that a tendency for greater stability and quality of employment emerges, to the extent that the period of stay increases, whereby the more recently arrived immigrants are more vulnerable to precarious employment.

As far as unemployment is concerned – according to IEF⁹ data – in January 2001 there were 5 300 immigrant unemployed enrolled in local centres and in January 2004, the number of unemployed immigrants had risen to 18 735. The biggest increase, by nationality, was registered among Eastern European citizens, Brazil and the United States of America.

As far as Eastern European and Brazilian migrants are concerned it is known that the rise of enrolments at the local employment centres is also corresponding to a general increase of these migratory inflows which is also being reflected in other dimensions. As an example, between 2000 and 2004 the rate of foreign people actively contributing to social security rose 832,8% regarding Eastern European citizens and 314,8% regarding Brazilian citizens.

Although a certain discourse denotes insecurity due to the presence of immigrants, especially in contexts of economic crisis and unemployment, the fact is that these individuals have been playing an important role in the Portuguese economy, in particular as regards the construction industry and public works – a strategic role too in a strategic sector for the country – where it can even be said that there is “a structural dependence of foreign labour” in that sector.

The weight of the foreigner active population on the total active population rose from 1,3% in 1992 to 5,3% in 2002. (SOPEMI, 2004)

According to a study carried out by *Caixa Catalunya* (2005), the Portuguese economy would have had a negative growth if it had not received the contribution of thousands of immigrants who came to Portugal to work between 1995 and 2005. During this decade, the PIB/per capita rose at a rhythm of 1,6% every year, which only happened because of the contribution of foreign workers.

Without the effect of immigration, Portugal would be poorer in 2005 than it was ten years later. The same study shows that the wealth produced by each inhabitant in Portugal would have decreased at a pace of 0,63%/per year (similarly to what would have happened in Spain), whereas in the other 15 EU member states the loss would have been only 0,23%. Thus, Portugal is clearly more dependent on foreign labour than the EU15.

These conclusions by the Spanish bank, namely the size of the impact of immigration in the Portuguese economy are considered “plausible” by the High Commissioner for Immigration and Ethnic Minorities.

Some specific governmental measures have been taken in order to promote the labour insertion of the immigrant populations. These measures are being promoted through the High Commissioner (ACIME) and include:

- Insertion Units into Active Life (UNIVA) integrated into the National Immigrants Support Centres (CNAI) and in some immigrants’ associations. These UNIVAs are the link with the IEF which is responsible for providing specific professional training courses addressed at this population;
- Offices for the support in certifying skills and competences – in partnership with the Education Ministry, the Higher Education and Science Ministry, the Labour and Social Security Ministry, the ACIME and immigrants’ associations.

⁹ Institute for Employment and Professional Training

Immigrants also have access to micro-credit, both through the National Association for the Right to Credit (ANDC) or through several bank agencies.

The micro-credit line belonging to the CGD (*Caixa Geral de Depósitos*) was established through a protocol with an NGO – Jesuit Refugee Service – and its main goal is to finance small businesses promoted by immigrants in Portugal (it grants a minimum of 500 euros and a maximum of 7500 euros).

To have access to this service, immigrants have to be legalised and to fulfil certain requirements: to be economically excluded and having no capacity to resort to other credits and to have the capacity to promote their own business.

In spite of the increase in the micro-credit offers in Portugal addressed at the immigrant population, the demands in terms of documentation and guarantees is, according to support organisations, preventing access to those opportunities. At the present moment, it is not possible to have the total number of micro-credit contracts established with immigrant population.

1.4. Education and training issues

In Portugal, both the Constitution and other specific legislation protect the rights of immigrants in regard to education. The law is clear in the sense that all children are entitled to education and have the right to be enrolled in school, no matter their legal situation in the country.

However, in practice, several problems directly related to the schooling trajectories of the immigrant population have been identified:

- The underachievement and early school-leaving of immigrants' children and the subsequent difficulties to accede the labour market;
- Difficulties in the insertion of immigrants into the labour market by lack of qualifications/school achievement;
- Under-utilisation and lack of recognition of immigrants' qualifications, particularly among more recent immigration flows.

According to the Eurydice report which analyses the integration of immigrant children in 30 European countries, there are 89 540 immigrant children, young people and adult integrated in the school system. The first cycle concentrates the higher number of foreign students (36 730 individuals) followed by the 3rd cycle of basic education (19 065 students).

The schooling situation of the children of immigrants from African Portuguese speaking countries (PALOP) has been widely described (Detry and Cardoso, 1996; GES; Monteiro et al (1996); Paes, 1993; Bastos and Bastos, 1999) as particularly disadvantaged compared to the general children and young people in Portugal. The relative disadvantages that derive from immigration processes, from the *"intercultural and linguistic clash, from the social, economic and housing precarious conditions, from educational gaps of relatives and from several other factors (such as racism and social exclusion)"* (Bastos and Bastos, 1999) are some of the factors that lie behind the schooling failure that affects these young people during their education trajectories.

At the same time, several indicators were showing that the school was not providing the most adequate conditions and responses to the needs of children and young people from different cultural and ethnic backgrounds. In order to better respond to such needs, in 1991, a new entity was created – the Coordinating Secretariat for Multicultural Education Programmes – which has been trying to create and disseminate new teaching/learning methodologies, according to the principles of a multi/inter-cultural education. It is the goal of such programmes to sensitise teachers, schools, particularly those where

there is a strong presence of children/young people from different cultural backgrounds, immigrants but also gypsy children.

Escolhas is another programme (at present run by ACIME) which has also been specifically addressing immigrant children and young people or 2nd generation immigrants living in vulnerable situation. During the last two years it comprised 86 projects and involved 39.000 beneficiaries, among which a total of 21.000 have been integrated in activities promoting inclusion in school and vocational training. A new stage of the programme is now open for applications.

One of the handicaps which is limiting immigrants' access to more qualified jobs and which are also contributing to higher levels of school failure among their children is the lack of Portuguese language skills.

Many non-governmental organisations, local authorities and schools have long become aware of such a difficulty. In the absence of any governmental strategy in this field these organisations have been promoting Portuguese language courses for free.

However, it should be stressed that most of the resources implemented in this particular field have only come to light with the increase of immigration from Eastern European countries. In fact, there seems to be a generalised trend towards a minimisation of the language difficulties felt by countries, where in spite of the official language being the Portuguese, their daily language is the several dialects or (non-official) languages from their own communities.

The idea that children who come from the PALOP countries face no language obstacles seems to be generalised even among organisations providing support to these populations and among the school communities. As an example of the way the Portuguese communities tend to see this question: *"the issue of language represents no obstacle for immigrants coming from PALOP countries, but it is a difficult barrier to be overcome for Ukrainian, Russian and Bulgarian immigrants, since they speak Slavic languages. People from Romania and Moldavia are, in this respect, facing less difficulties in learning Portuguese, since they speak a Latin language"* (<http://imigrantes.no.sapo.pt/index.html>)

Looking at the 2005-2008 National Reform Programme's guidelines (PNACE 2005-2008), under the section on qualification, employment and social cohesion, measure 17, there is the creation of specific measures for the teaching of Portuguese – addressed at the qualification of adults – from which are excluded immigrants coming from PALOP countries *"Intervention Programme for Unemployed Immigrants aims at the creation of better conditions for the professional (re)insertion of this specific group of the population, namely by promoting their training in citizenship basic skills and in Portuguese, for those immigrants not coming from PALOP countries, through the Programme Portugal Acolhe, improving the mechanisms for the recognition, validation and certification of immigrants' competences and promoting their professional insertion. It aims at promoting the integration of immigrants, by fighting social and working discrimination and it will involve 38.500 people."* (PNACE 2005-2008).

The exclusion of immigrants coming from PALOP countries from these measures does not seem to comply with the existing available statistical data: according to the 2001 National Census among immigrants living in Portugal, 9,3% cannot read or write and 8,7% can read and right but has no formal qualification. Almost one in every four immigrants in these two groups come from PALOP countries.

Another education-related problem affecting the immigrants' insertion into the labour market is the mismatch between the existing individual school resources and the type of professional integration. Even when the existing school resources would anticipate an easier professional integration, problems do arise.

The under utilisation of the immigrants' existing schooling competences had already been identified regarding some groups of immigrants from PALOP countries (cf. Perista, 1993). This gap leads to an obvious waste of an important human capital but also to a serious gap in the expectations these immigrants had with negative consequences in their social integration in the host country.

This phenomenon has recently gained even more visibility by the recent arrival of immigrants from Eastern European countries. There are no concrete data for an objective characterisation of these "new" immigrants, in the national context. However, there are, qualitative available information provided both by immigrants' associations and by organisations working in the field which stress the existence of a high percentage of individuals who have completed higher school education and technical/vocational diplomas¹⁰.

Given the Portuguese context¹¹, the high level of qualification among this population is one of the most noted characteristics. A recent study on Eastern immigrants (CESIS, 2004) among the 166 individuals from 11 different Eastern European nationalities, 36.3% had completed university, 49,1% had completed a technical/vocational schooling level and only 10.4% had not completed any of these levels.

In fact, the over-qualification of a reasonable number of Eastern European workers regarding their actual integration in the Portuguese labour market, through the performance of low qualified tasks (construction, hotels and restaurants, security and cleaning services, among others) has given a higher visibility to this already existing phenomenon of the under-utilisation of the potential among immigrant populations.

The request for equivalence regarding academic degrees obtained abroad is regulated in Portugal in a proper way. However, according to Manuel Solla, President for the National Commission for the Legalisation of Immigrants *"the process is very slow and difficult to conclude, contrary to what has been said... there are citizens waiting for an answer for two to three years and who have no guarantee to obtain validation of their curriculum, or at least, of a part of it (...) the equivalence request costs 500 euros, which is a considerable financial effort for the applicants, which is translated into a benefit for the universities."* (in, *Notícias ACIME* 07-04-05)

Commenting on the programme for the certification of competences for foreign medical doctors, which has been presented as a good practice in this area, Manuel Solla highlights the fact that *"the candidates apart from proving their qualifications, have to pass a Portuguese exam, a scientific exam and a voluntary and free vocational period of one year. Even so, in the working context, foreign doctors refer to the class corporativism and the sense of mistrust among their Portuguese colleagues, particularly in situations where there is professional competition."* (in, *Notícias ACIME* 07-04-05)

1.5. Housing and related issues

In the absence of a consistent housing policy in Portugal, access to decent housing amongst the immigrant communities in Portugal is very much linked to their respective social and economic situation and resources. This said, it is also important to bear in mind the process of urban development in Portugal characterised by a concentration of activities and populations in the coastal areas – particularly

¹⁰ The Bereg association – Ukrainian immigrants' association – referred that around 40% of their associates have a higher education diploma and 100% have completed 12th years schooling. In comparative terms, in 2001 the percentage of individuals who have completed the 12th year schooling was 15,7% (NSI)

¹¹ According to the 2001 National Census, only 6% of the Portuguese population completed university; 30,2% of the population aged more than 15 years completed only the 1st cycle of secondary school and 60.3%, finished basic education.

in Lisbon and Porto – and the resulting lack of adequate and available housing. Thus, the development since the beginning of the 1960s of the so-called “shanty towns” and other forms of illegal housing in the major metropolitan areas.

Much of the immigrant population tends to live mainly in Lisbon and in rundown urban areas, resulting from these processes of spatial and social segregation created by unequal opportunities of access to the housing market. Therefore, the precarious housing situation of a large part of immigrants leads to and concurrently reflects the conditions in which these groups live.

The absence of responses to the housing needs of an increasing number of people with low income leads to serious situations which refer to the degrading conditions in which a large part of the immigrant population settled (and lived for decades).

On the other hand, the permissiveness of the State in regard to the solutions found by the people themselves or the consequent development of extensive areas of rundown housing, ultimately work as a kind of a “protective cushion” against potentially more extreme housing situations. This explains the feeble presence of immigrants among the homeless population.

These and other mechanisms have contributed to the high spatial concentration of communities of African origin, especially in the Lisbon Metropolitan area. This concentration, which has made it possible to maintain neighbourly relations and the maintenance of informal solidarity networks, at the same time, consolidates a process of socio-spatial segregation. These social, physically enclosed spaces tend to accentuate the boundaries between the communities of immigrants and the developing context, thereby making difficult the process of integration in the enlarged community and promoting negative images.

Unlike the migration flows from PALOP countries, where the process of settlement in Portugal was (is) characterised by a dense geographic concentration in the regions of Lisbon and Setúbal, the most recent settlement of immigrants from Eastern Europe appears to follow different patterns.

In spite of the absence of studies that would allow a comparative analysis of these migratory flows, a pattern of regional distribution emerges clearly differentiated from that of African immigrations: unlike the geographic concentration in Lisbon and Setúbal, as already indicated, there is a clear geographic dispersion from north to south in the country, albeit with a greater concentration in Lisbon.

In the case of immigrants from the PALOP, the decision to immigrate appeared to follow a settlement pattern based simultaneously on employment opportunities and chiefly individual/family choices, leading to a residential strategy better suited to these premises. In the case of immigrants from Eastern Europe – and in the absence (at least for the time being) of informal support networks – the predominant strategy appears to aim at integration in the world of work and then housing, dictated less by individual choices, and more by the operation of organised networks that facilitate this geographic dispersion.

It is worth pointing out, at this point, that in recent years, the promotion of rehousing units by the Special Rehousing Programme (PER) of thousands of families living in “shanty towns,” has also provided access to social housing for many immigrants who were living there. The rehousing process initiated in 1993 by the municipalities of the Lisbon and Porto metropolitan areas, which is still in progress, has adopted an essentially pragmatic approach to the eligibility criteria for rehousing, namely, rehousing all those registered in 1993, irrespective of their nationality or legal status.

In this respect, there has recently been a vivid public debate, particularly dynamised by Immigrants’ Associations, regarding the situation of immigrant families who have been living in shanty towns for several years now, but who arrived after the 1993 specific census under the scope of the PER and

therefore were not entitled to recouping. Several shanties in different shanty towns in the Lisbon area have been pulled down in recent months and the families evicted which has provoked several public demonstrations for the support of those families and their Constitutional right to be rehoused. Whereas some of the municipalities have arranged for the rehousing of those situations involving families with children, the same has not applied to single male individuals.

In more recent years it has been possible to observe a growing concern with reducing the distance between the social housing areas and the surrounding city (public transports), the building up of social equipment for the population in general and the promotion of housing for other population groups in the vicinity. Some specific programmes included in the recent NAPIncl are specifically addressing these issues.

At the same time, two new measures also included in the 2006-2008 NAPIncl address the specific problems of critical areas, namely in urban territories, some of them with a high percentage of immigrant population. Such is the case of the Critical Neighbourhoods Pilot Project which aims at *"promoting the social and urban integration of territories which present critical vulnerability factors"*.

1.6. Social services

A wide range of services directly targeting the immigrant populations have been created in recent years, both by the organisations of the civil society and by the State, through the afore mentioned High Commissioner for Immigration and Ethnic Minorities (ACIME).

A special reference should be made to the National Immigrant Support Centres (CNAI) and to the Local Immigrant Support Centres (CLAI) which have been recognised by the European Commission as an innovative practice.

The CNAI were created in 2002 and are located in Lisbon and Oporto. They have been created in order to respond, in an integrated way, to immigrants' diverse problems. These centres result from a partnership between different governmental departments (Health, Employment, Education, Social Security among others) and non-governmental organisations. The access to the services is facilitated by the presence of immigrants' mediators (from 10 different nationalities).

The CLAI network started in 2003 and it already comprises 24 CLAI in partnership with immigrant associations and NGOs which were already supporting this population and another 26 CLAI in partnership with local authorities, in territories which were not covered by the above mentioned CLAI. All the centres have a trained mediator and provide all the information which is made available by ACIME (brochures, internet access, SOS immigrant line).

The SOS immigrant line was created in March 2003 is a phone service which provides all relevant information on immigration issues, namely when there are "serious" situations to be solved and it is specifically targeting immigrants, their associations, public administration entities and private firms or other organisations which need information on this specific area. There is information available in Portuguese, Russian, English, *Crioulo* and French. Up to January 2005 a total of 54 600 calls had been answered, the majority of which in Portuguese and Russian and the main topics were related to legalisation and labour issues. Almost half of the calls were made by the immigrants themselves (followed by their employers and relatives) and among these 61% had an irregular situation.

In March 2004 a new support centre was opened in Lisbon and Oporto specifically addressing the issues of family regrouping: *Gabinete de apoio ao reagrupamento familiar*. These centres support

immigrants' citizens in their request for family regrouping by providing the relevant information and by the follow-up of the processes.

There are also the Social Support Centres which are backing up the CNAI in this specific kind of support. ACIME also has temporary shelters and a juridical support office.

A study on the conditions of health among the immigrant population in Portugal is currently being undertaken which will characterise the levels of health and the equity in the access to health care among the immigrant population. It is the first time that such a survey is being launched in Portugal.

As far as access to health is concerned, according to the Constitution and to further legislation all foreign citizens, who are legally residing in Portugal, have the same rights and duties of national beneficiaries, in their access to health care and support in medicines, within the scope of the NHS.

Foreign citizens which are not legal have access to health care through emergency rooms. Children and young people under 18 years old have free access to health care in spite of their situation.

In spite of free access to health care for children who are illegally living in the country, it has recently been acknowledged that *"illegal immigrants do not go to local health centres for vaccination of their children, because they are afraid to be held by the authorities"* (ACIME 12/2003).

1.7. Target groups issues

A recent study published by the Immigration Observatory (ACIME) showed that most immigrant women coming from PALOP countries, from Brazil and from Eastern Europe are working in low qualified jobs, no matter the schooling achievement they got in their origin countries. Differences were found according to the different nationalities and the different sectors of activity they are working in jobs related to domestic services for the support to families are usually informal jobs and socially undervalued and they aim at replacing the work of Portuguese women who have a high level of participation in the labour market, whereas those jobs associated to trade or services have a higher social valuation.

The study also highlights the low level of visibility of immigrant women compared to that of men, which is obvious in the analysis of the national press. Immigrant women get more attention from the media only in specific areas such as prostitution and trafficking.

The only particular measures referring to the specific situation of women are precisely those that relate to human trafficking and prostitution which are included in the 2006-2208 NAP incl, namely the Observatory on Human Trafficking and the Model for the Support of victims of human trafficking, which includes the opening of a specific Refuge for women victims of trafficking.

1.8. Information, communication and culture issues

The Portuguese Constitution establishes that foreign citizens living in Portugal have the right to vote (article 15º, nº4), under reciprocity conditions and in local elections. According to the High Commissioner for Immigration and Ethnic Minorities the reciprocity principle should be an indicative criterion and not a compulsory one, since very often origin countries do not accept the same principle because they do not want to allow a more effective link to their own immigrants. Thus, many of those immigrants who have come to Portugal do not in effect exert their right to vote.

Brazilian immigrants have a specific status deriving from an agreement between Portugal and Brazil: all those who have a residence permit for more than three years may request the status of equal political rights in Portugal, which grants them the right to elect the President of the Republic. However, according to the Casa do Brasil in Lisboa: *"there is very little information on this subject, which explains why the number of electors is so small"* (Agência Lusa).

ACIME has launched several information initiatives aiming at promoting a better access to information among immigrant population. Some of these initiatives are listed below:

- Website with institutional information, events related to immigration issues, updated news, FAQ, legislation, documentation, support organisations, among other (948499 visitors since October 2003 to January 2005);
- Information leaflets in English and Russian on themes such as immigration legal framework, access to education for children, family regrouping, voluntary return, juridical tools to combat racism, among others;
- Informative Bulletins are issued monthly and are specifically targeting leaders of public administration offices, immigrants associations, municipalities, journalists, researchers and public in general; the bulletins deal with the immigration issues in Portugal;
- TV Programme *"Nós"* is a weekly programme which gives information on immigration in Portugal through interviews, debates, information magazines on rights and duties, culture of the different communities, among others;
- Support given to the publication of books, thesis and relevant research on the immigration area;

The immigrant communities also have newspapers and radio programmes which are run by their associations.

A recent (2005) study published by ACIME and developed under the scope of the Communication Observatory specifically addressed the issue of "The images of immigrants and ethnic minorities in the press".

On the basis of press articles dated from January 2001 to March 2002, the analysis found that 30% of the subjects present in the news on immigration were about eastern countries immigrants, followed by the category classified as "immigrants in general" (28%). The gipsy communities and immigrants from the Portuguese speaking countries, appear in 3rd and 4th place. This high visibility of Eastern European immigrants in the press during 2001 is linked to their recent arrival to Portugal

An overview of the subjects related to **immigration** shows some interesting results: the two most common themes are integration (43%) and the difficulties experienced (40.9%) by these communities.

On the other hand, when the focus is on **immigrants** and ethnic minorities the most common themes in the national press are: robbery (14,5%), hosting (6,3%) and the fight against the exploitation and traffic (5,5%).

According to the study, the link between immigrant/ ethnic minorities and violence/robbery is made not on the basis of their integration problems (marginalization, illegality, for example) but on the grounds of ethnic/cultural differentiation in reporting the news.

1.8. Emigration

Emigration remains an important characteristic of the Portuguese population dynamics. Since 1993 there has been an increase of temporary outflows (individuals who left the country for a period equal or less than one year). The autonomous regions of Madeira and Azores are the only two territories where permanent immigration exceeds temporary one.

According to the Survey on Migratory Outflow Movements (NSI), 52% of the 27 thousand Portuguese who left the country in 2002 have completed either secondary or higher education. The reasons behind this migratory wave are unemployment increase and the low level of salaries in Portugal. Switzerland and France are the two major destination countries, followed by Spain. It is important to highlight that among these emigrants it is possible to find many researchers, which turns this movement into what has been called a "brain drain". According to the World Bank Report, "International Migration, Remittances and the Brain Drain" one in each five Portuguese with higher qualifications (or 19.5%) lives out of Portugal which places Portugal in the 21st. position of the ranking of "brain drain", within the nations over 5 million inhabitants. The Portuguese Government has set up some specific measures aiming at offering more attractive answers to the needs of Portuguese doctorates and researchers (e.g. PNACE measure aiming at stimulating the creation of qualified employment in science and technology).

A different challenge is the one raised by the high number of low qualified emigrants who are working in European countries living under serious exploitation situations. As an example, the media revealed that there are 20 thousand Portuguese workers in the building construction sector in Spain, 60% of whom are living in precarious labour conditions.

1.9. The Gipsy communities

The integration challenges faced by gipsy communities present distinctive features from that of immigrant population. Thus, we have opted to include a separate chapter highlighting the main relevant features and concerns to be taken into account by any policies addressing the integration of this particular ethnic and cultural minority.

The gipsy communities have been living in Portugal for at least five centuries and "they have been able to preserve their culture and way of life, almost always at the margin of the mainstream society, which has also contributed to their highly marked social exclusion (Magano e Ferreira da Silva, 2000).

The demographic dimension of the gipsy communities is not well known but certain statistical data refer to around 20 to 30 thousand individuals (Pinto, 1998), while other sources refer to the existence of 50 to 100 thousand gipsy individuals living in Portugal. According to some authors (Montenegro, 1999) this lack of knowledge contributes to the distant relationship between gypsies and the mainstream society: *"The lack of knowledge is mutual. The community in general ignores the culture of gypsies and these ignore the rights and duties they have as citizens living in great isolation"*. (Montenegro, org, 1999)

The invisibility of the gipsy population, in statistics, scientific knowledge and policy measures contrasts to their strong *"ethnic and social visibility"* (Pinto, 1998). Gipsy communities are present all over the national territory, by the development of economic activities which they have been traditionally performed – markets and fairs, seasonal rural activities, peddling – and by the involvement – and consequent media coverage – in drug trafficking and the subsequent increase of their stigmatisation.

In several places around the country, there was a rise of intolerance attitudes regarding these communities which led to them being expelled from areas where they were living for over a decade and their concentration in "housing parks" of shanties outside the urban localities and without any kind of infrastructure.

According to a 2001 report from an NGO (SOS racism), the most frequent prejudices and stereotypes regarding gypsy people are that "they are dirty, look bad, are frightening, do not work, are involved in illicit businesses, steal, cause conflict, live on the social insertion income, have houses that have been given to them, do not adapt to social rules, cause neighbourhood troubles (noise, violence and criminality), are aggressive, only send their children to school to get the minimum income." (SOS Racism, 2001)

According to the existing studies on gypsy communities in Portugal several demographic characteristics can be highlighted: young demographic profile, very early marriages and high number of children and multi-generation cohabitation.

The main Professional activities developed are related to selling (on the street or in markets), handicraft, horse breeding, seasonal agricultural campaigns in Portugal and Spain. All these activities are currently threatened by higher fiscalisation (street and market selling), by the competitive prices in big supermarkets and by trade coming from China, the rise of Eastern European migrants who are preferred by employers for agricultural campaigns since they do not have the same family context.

Most of these activities are run in the margins of the fiscal system (no payment of taxes or social security contributions) and oblige constant moving from one place to another.

Other characteristics which have a strong impact on the Professional and family life of these communities is the "prevalence of an inner culture under the scope of the family network and the refusal to delegate educational tasks to any institution up to 6/7 years old." (Cruz, 2004) Children rarely go to pre-schooling (or even compulsory school) and they follow their mothers in all their daily activities and travelling.

In spite of the efforts made by some insertion programmes, namely the Social Insertion Income (former GMI), which led most gypsy children to enrol in school, their school trajectories are characterised by failure and absenteeism.

Among gypsy communities the issue of school education is seen in a particular perspective: *"The education of gypsy children is structured around the family, where the failures and/or successes and lived as experiences to be incorporated in their practical know-how. The family is always present and it conveys them all the security and well-being (...) it is a source of unending affection, understanding and support (...) Education is permanent, which means that there are no different times to learn, play or work (...) parents do not trust school nor its educational role. If the role of school is to train children for later work then what happens is that when a gypsy child goes to school, she or he is separated from the necessary learning to the exercise of their profession."* (Sousa. in <http://www.multiculturas.com>)

In this context, currently foreseen measures included in the 2006-2008 NAPincl regarding ensuring access to school to a 100% of children under 5 years old will necessarily have to take into account specific inclusive measures addressed at particular groups of children, such as children from gypsy communities. This is even more important taking into account the growing difficulties faced by the gypsy population in the development of their traditional professional activities and the difficulty to build new professional projects.

Although state interventions in the health care system should guarantee all citizens free access to health care, as established in the 1975 Constitutional Law, the effective access to health services has encountered many practical hindrances along the route.

Access to health is, in fact, another dimension where the gipsy communities continue to experience difficulties. Although there has been an increase in vaccination, in pre and post birth consultations, in the use of contraceptives and in access to emergency rooms, there are still high rates of incidence of transmissible diseases (hepatitis and tuberculosis), and the relationship with the health services is characterised by feelings of exclusion (Magano e Silva, undated; Cruz, 2004).

In a local community in the surroundings in the south of Lisbon (Seixal) a specific programme was developed – *Saúde sobre Rodas* (Health on Wheels) – aiming at promoting access to health centres and hospital and to educate towards prevention in the scope of child and maternal health, by going directly to where people are living.

As far as the gipsy communities are concerned, state intervention has been indifferent and the difficulties in acceding/adapting to the education or the health system keep repeating in areas such as social security or housing policies. The adoption of measures aiming at the inclusion of the gipsy population is usually seen as controversial among the non-gipsy population and maybe, because of that, they have never been seriously addressed or implemented by the several governments.

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