

NATIONAL REPORT – PORTUGAL

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1 GENERAL INFORMATION ABOUT VOLUNTEERING IN PORTUGAL

1.1 History and contextual background

Portugal's non-profit sector has deep historical roots but is now in the process of developing and strengthening its role in society. There are very old non-profit organisations still active and still relevant, such as the Holy Houses of Mercy, and there are also some very recent organisations that were created after the 1974 revolution. These are devoted to a diverse range of activities, such as advocacy associations promoting environmental issues, immigrants' rights, and women's rights.¹

These features of the Portuguese civil society sector reflect the country's long history of civil society development. This history has been influenced by four major impulses—first, the country's Roman Catholic heritage; second, its long tradition of mutuality and self-help; third, its equally long history of authoritarian political control; and fourth, its recent democratic transition, which has led to a growing reliance of state agencies on private non-profit groups.

The Portuguese civil society sector has roots dating back nearly a millennium. Early monarchs and Roman Catholic Church leaders created and supported a wide array of charitable institutions, and later the Portuguese maritime ventures introduced new forms of civil society activity. With the Industrial Revolution, new mutual associations emerged to address the needs of people that had been affected by major socio-economic and societal changes.

Through it all, however, Portuguese civil society organisations operated within the constraints of a paternalistic social regime featuring a close alliance among Church, state, and rural elites. This kept civil society confined to essentially assistance activities through much of its history, except for a brief liberal interlude in the late 19th and early 20th centuries. With the rise of the Salazar regime in 1926, the operations of civil society organisations were again confined, and then the overthrow of this regime in the early 1970s opened the way for a surge of non-profit activity. As a consequence, Portugal has a civil society sector that, while smaller than its counterparts elsewhere in Western Europe, is substantially larger than its counterparts in many of the countries of Central and Eastern Europe with which Portugal shares a recent history of authoritarian control.

In Portugal, after the fall of the "Estado Novo" dictatorship in 1974 and the resulting establishment of democracy did the first NGOD (Non Governmental Organisations for Development) start to arise. It was only on the 24th of May 1994 that the Portuguese State recognised the statute of NGODs defining their principles, ways of action and organisation.

Following the International Year of Volunteering promoted by UN in 2001, the Portuguese government constituted the National Commission for the International Year of Volunteering, which conducted several studies about volunteering in Portugal.

In the following years the National Commission for the International Year of Volunteering was renamed to "National Council for Volunteer Promotion" and since 2003 has been creating several local volunteer centres all over the country.

¹ Defining the Nonprofit Sector: Portugal (2005)

1.2 Definitions

Through law, volunteering was recognised by the Portuguese government as a way of expressing citizenship. The law establishes the legal framework for volunteering in Portugal- it defines:

- What volunteering is
- Volunteer
- Host organisation

The law 71/98 defines "volunteerism" as a set of "community and social interest activities" carried out without an economic interest by individuals, within the framework of projects or programmes developed with a non-profit purpose by public entities or private organisations for the benefit of needy individuals, families or communities. The law expressly excludes from its scope of application those activities carried out in an isolated or sporadic way or on the basis of familiar, amicable or similar relations, as it considers that voluntary activities should be of substance and be carried out on a regular basis.

A "volunteer" according to the Portuguese law is an individual that in a free and responsible way commits himself/herself to perform voluntary activities within an organisation, according to his/her skills and time available, without the expectation of payment.²

Another classification of volunteering, presented by the National Council for Volunteer Promotion refers to an activity done of one's free will for the benefit of others.

1.3 Number and profile of volunteers

In Portugal, there are very few published statistical data on volunteering and literature on the subject is not abundant. The topic attracted more attention after the International Year of Volunteers in 2001. The first study of characterisation of volunteering in Portugal came in 2002, an initiative of the National Commission for the International Year of Volunteers. It should be noted that this study represents an important national reference, because of the conceptual framework and methodology that it developed and also because it is the only national study, with empirical results.³

The following sections are mainly based on data stemming from the following sources:

- A study conducted by the National Commission for the Volunteer International Year in 2001 for 2366 non-profit organisations⁴;and
- In 2002 the Portuguese Platform for NGOD conducted a study of their 45 NGODs members in order to characterise the human resources involved in those organisations;
- The results of John Hopkins University study on the non profit sector in Portugal (2005).

2 CEV/ AVSO, Country Report on the Legal Status of Volunteers in Portugal, 2005

3 CÂMARA MUNICIPAL DO PORTO-Gabinete de Estudos e Planeamento, Departamento Municipal de Estudos

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Total number of volunteers

According to the study conducted by the National Commission for the Volunteer International Year in 2001 for 2,366 non-profit organisations, there were 50,000 volunteers, most of them associated with youth associations and volunteer fire brigades.

In 2001 only **12.7%** of Portuguese population was engaged in volunteering activities.

Trend

According to a study carried out by the Sport Faculty of Porto University, the country has a low rate of volunteering to the order of 16%; this figure was derived from data collected by the European Study of Values (ICS, 1999). Note also that participation of the Portuguese population in volunteer work had **decreased** compared to data collected in 1990, when the participation rate was 19% of the population. According to figures collected by this study these percentages are below the European average (38%). The low volunteering rates can be explained by a set of social, economic and political factors, affecting both the number of volunteers and the size of the demand that depended on the availability of institutions to host volunteers.⁵

Gender

The study conducted by the National Commission for the Volunteer International Year in 2001 indicates that 53% of the volunteers were men.

The Portuguese Platform for NGOD conducted a study in 2002 of their 45 NGODs members in order to characterise the human resources involved in those organisations.

Human resources profile of NGODs is as follows:

- 56.6% women.
- 43.4% man.

Age groups

Study conducted by the National Commission for the Volunteer International Year in 2001 for 2366 non-profit organisations

- 68% are between 20 and 65 years old.
- 17% are less than 20 years old.

Considering the age groups in NGOD, young adults aged 25-30 and adults aged 31-45 constitute the main groups of human resources. People aged 46-65 represent the smaller group of human resources.

Education levels

Study conducted by the National Commission for the Volunteer International Year in 2001 for 2366 non-profit organisations

- 33% have less than secondary studies
- 16% have a university degree.

Volunteer involvement by sectors

According to the JHU study, a larger proportion of the non-profit workforce in Portugal is engaged in providing social services (48 percent) and a far smaller proportion is engaged in providing health or education services, than is the case internationally;

⁵ Sports Faculty of Porto University-“Os Recursos Humanos Voluntarios do Hóquei em Portugal”

In addition to its service functions, a substantial proportion of the Portuguese civil society organisation workforce is also involved in expressive activities, such as culture, arts, recreation, and civic participation.

In terms of volunteer FTE, the distribution of volunteers is as follows:

- Social services 36%
- Not elsewhere classified 32%
- Culture and recreation 12%
- Professional and unions 8%
- Religious worship 7%
- Education and research 3%

The main areas of the volunteer work in NGOs are related to the promotion of culture, environmental issues, peace and gender equality.

According to a 2006 study, the associations where there was greater involvement of people were "Sporting, cultural and recreational activities" (28%) and the "social solidarity and religious" (26%).⁶

Profile of volunteers by employment status

Study conducted by the National Commission for the Volunteer International Year in 2001 for 2366 non-profit organisations

- 54% had a profession;
- 19% were pensioners.

In terms of socio-demographic factors people of working age, that were professionals or students (with family and children) and with a higher level of schooling than the national average were more generally engaged in volunteering activities.⁷

Time dedicated to volunteering

The study conducted by the National Commission for the Volunteer International Year in 2001 for 2366 non-profit organisations indicated that:

- 75% of volunteers participate at least once per month;
- 53% offer between 5 to 10 hours per week;
- 25% are occasional volunteers.

Many volunteers dedicated a quite high average weekly time to the voluntary activity and tended to remain associated to the institutions for several years. Volunteer work is presented as flexible, in that there are frequent situations in which volunteers participated in the activities of various institutions or performed various tasks at the same institution.

The time dedicated to volunteering in terms of hours per week was in 2004⁸:

- 1 - 4 hours 45%
- 5 - 10 hours 30%
- 10 - 20 hours 16%

6 Voluntariado na Cidade do Porto-Camara Municipal do Porto (2006)

7 CÂMARA MUNICIPAL DO PORTO-Gabinete de Estudos e Planeamento Departamento Municipal de Estudos

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- > 20 hours 9%

1.4 Number and types of organisations engaging volunteers

Definition of voluntary organisations in Portugal

Consistent with the JHU definition, the civil society sector in Portugal is very broadly conceived, embracing service-providing organisations that supplement or complement public services in such areas as health, education, and social welfare, and organisations that offer mechanisms through which individuals can join together to address community needs, participate in political life, and pursue individual and group interests.

There are sets of non-profit institutions that are highly visible in Portugal, and clearly differentiated from both the private for profit sector and from the public sector. The most frequently used terms to describe a set of these organisations are “solidarity institutions” (instituições de solidariedade), and “social sector” (sector social), although these terms are typically used to identify only social welfare institutions rather than the entire third sector as defined by the structural- operational definition adopted in this project.

Other frequently used terms include:

- “non- profit organisations or institutions” (organizações ou instituições sem fins lucrativos ou não lucrativas),
- “social and/or solidarity economy” (economia social e/ou solidária),
- “nongovernmental organisations” (organizações não-governamentais),
- “third sector” (terceiro sector),
- “third system” (terceiro sistema), and
- “alternative economy” (economia alternativa).

Portugal follows the wide-spread definition that a non-profit organisation is a private self-governed organisation independent from the government whose profits are not shared between its members, but reinvested on the organisation itself. They are mainly focused in the conception, execution and support of social, cultural, environmental, civic and/or economical projects.

In the CEV report, a special focus is given to the NGOD. This is due to the fact that most of the facts and figures available in Portugal relate to this area. Notably the Portuguese Social Platform for NGOD provides a great deal of data in this respect, which can be accessed at www.platformaongd.pt. However, it is clearly understood that they represent only one area of the volunteering sector in Portugal.

Number of voluntary organisations and distribution per sector

NGOD is one of the most important and structured organisations of the third sector in Portugal. In 2003, a total of 88 NGODs were registered in Portugal. The number of NGODs registered at the Platform slightly increased from 45 in 2003 to 49 in 2005.

In Portugal the interventional areas of NGODs are essentially:

- Emergency help, which answers immediately to unpredictable events for a short time period.
- Humanitarian Help, that aims to minimise the suffering and poverty of millions of human beings that are victims of hunger, war, social injustice, and other human and natural catastrophes.

- Cooperation for Development is a long term project, which aims to create a social structure for a problematic population in order to establish a sustainable society.
- Education for Development consists of projects and initiatives designed to mobilise public opinion, as well as specific sectors of society, for the understanding of development issues and for the promotion of a change of attitude towards these issues.

Types of organisations engaging volunteers

Portugal does not have a unified legal system for non-profit organisations. Within Portugal's civil law system, the legal framework for non-profits is dispersed through a wide range of laws, which regulate the formation of different types of organisations. This causes some confusion and a lack of understanding about the legal framework, which therefore, diminishes the impact of the non-profit sector in Portugal.

The right of association, guaranteed by the Portuguese Constitution, is of absolute importance for the non-profit sector in Portugal, which is largely composed of associations incorporated as non-profit organisations.

Data from the study conducted by the National Commission for the Volunteer International Year in 2001 for non-profit organisations show that:

- 34% of the organisations did not work with volunteers.
- 27% of the organisations had volunteers involved only with secretariat.
- 39% of the organisations had volunteers involved with work camp.

Share of employees

According to the JHU study the volunteer share of civil society workforce was lower in Portugal than in most developed countries. The volunteer share of the non-profit sector workforce in Portugal was lower than it was in the other developed countries for which data were available. Thus, volunteers comprised only **29 percent of the full-time equivalent workforce of Portuguese civil society organisations** compared to 38 percent in all the other 38 countries. Likewise, the amount of volunteer effort in Portugal was also below both the international and developed country averages (1.1 percent of the economically active population in Portugal vs. 1.6 and 2.6 percent, respectively, for all 38 countries and the 18 developed countries alone).

Regarding the human resources profile of NGOs, it is composed of 55.8% of volunteers and 44.2% paid staff.

1.5 Main voluntary activities

Main tasks performed by volunteers are the following⁹:

- 93% - Participation in social organisms.
- 85% - Seeking of financing.
- 72% - Public Information Campaign.
- 60% - Direct support to beneficiaries in specialised tasks

⁹ "O voluntariado"-Instituto de Solidariedade Universitaria (Institute of university solidarity)

2 INSTITUTIONAL FRAMEWORK

2.1 Main public bodies and other organisations involved in volunteering

Main public body responsible for volunteering

The governmental entity promoting volunteering is the **National Council for the Promotion of Volunteering (NCPV)**. The Council is directly dependent on the **Ministry of Labour and Solidarity**.

The National Council for Volunteering Promotion (CNPV) has the task to promote and support the development of volunteering as well as to engage several actions related to the effectiveness of volunteer rights.

CNPV's president is nominated by the Minister of Social Security and CNPV is composed of representatives of the Minister of the Foreign Affairs and several social organisations. CNPV, which was established in 2000 and started its activity in 2001, is responsible for the promotion, qualification, in-depth study and organisation of volunteering in Portugal.

CNPV undertakes a range of activities, including:

- Keeping volunteering high on the policy agenda, working with the government to promote it;
- General information to volunteers, local /national organisations of volunteers and citizens;
- Organisation of meetings, colloquies, conferences and specific debates on volunteering;
- Organisation of a special session to celebrate the International Day of Volunteers (IVD), each 5th of December;
- Preparation of several studies and inquiries about volunteering throughout 2006 and 2007;
- Issuing, at a national level, of a Volunteer Identification Card. This started in December of 2006;
- Internet site about volunteering - www.voluntariado.pt (contains useful information on legislation, agenda of the main events, how to become a volunteer, national and international websites, voluntary testimonies, good practices, social responsibility, among others), This site was launched in March 2005;
- Organisation of sessions of "training for trainers" about volunteering all over the country, based on a trainer's handbook about volunteering. These sessions have been organised in 12 of the 20 regions of Portugal;
- Publication of a bulletin, every three months, called "Voluntariado, hoje" contains relevant information about volunteering;
- Technical support to "Local Volunteer Centres" - the meeting points of people who wish to volunteer and organisations that want to recruit volunteers. There are 36 Local Centres of Volunteering throughout the country and 16 are in a phase of development. The great majority of these structures, are attached to the municipalities;
- New edition of the Volunteer Guide in 2007 (contains rights and duties for volunteers and organisations);

- Permanent construction of a database of local / national organisations of volunteering in Portugal that is accessible through the website.

Other public bodies involved in volunteering

Many local and national organisations, as well as, non-governmental organisation play an important role in supporting volunteering and encouraging people to volunteer.

Organisations that promote volunteering, facilitate co-operation and exchange of information

The **Social Platform for the Non- Governmental Organisations for Development** (NGOD) was created on the 23rd of March 1985 and serves as a link between NGOD, civil society, public authorities and other organisations.

The **National Council for Volunteer Promotion** has been creating several local volunteer centres all over the country since 2003. The idea of these local volunteer centres is to have a local, flexible and decentralised structure capable of promoting volunteerism.

16 volunteer centres have been established so far, some of them are still at the implementation phase, and they are located in Arganil, Barreiro, Cascais, Castelo de Vide, Coimbra, Figueira da Foz, Idanha-A-Nova, Lisboa, Lousã, Moimenta da Beira, Oeiras, Região Autónoma da Madeira, Santo Tirso, Tavira, Tomar and Vila Nova de Gaia. All of these centres are being promoted and financially supported by their own local government, thus, proving that the public sector's interest in promoting voluntary work in Portugal is maintained by the State.

Their main goals are to:

- Promote the connection between volunteer supply and demand.
- Recruit people interested in volunteering and then to direct them to volunteering organisations.
- Encourage people to participate in volunteering activities.
- Make public volunteering opportunities and projects.
- Explain the idea of volunteering.
- Co-ordinate volunteering activities.

Finally, the Portuguese Youth Institute (Instituto Português da Juventude (IPJ)) grants young volunteers and volunteer organisations:

- Technical support necessary for the development of their volunteer projects;
- Payment of the international travel costs of the volunteers;
- A lump sum of around 125 EURO per month to each young volunteer;
- In justified cases, financial support of up to 75% of the project's budget.

2.2 Policies

The State is the main actor engaged in promoting and supporting voluntary work and the idea of volunteerism across Portugal. However its initiatives and campaigns are more directed to young people than to other age groups. In spite of this effort only recent national events like the European soccer championship 2004 and Rock in Lisbon managed to mobilise significant number of people for volunteering.

Following the creation of CNPV in 2000 (formed by advisors that represent several ministries, and NGO's (Red Cross, Portuguese Fireman League, Misericordia's Charity Union) a number of actions have been taken:

- Creation of more **Local Centres of Volunteering** (LCV). LCVs are places where people, who wish to volunteer and organisations interested in receiving them get information and support. The National Council for the Promotion of Volunteering (NCPV) edited a Guide in 2004 that contains the rules/proceedings for the implementation of these centres at national level. One of the aims of "The National Action Plan for Inclusion" (NAPC) was to implement 50 LCVs by the end of 2005. There were around 35 LCVs at the time of the adoption of the measure.
- Enlargement of the CNPV composition.
- Training – to organise and support the training of volunteer trainers. The Trainer's Handbook was edited by the CNPV in May 2005.
- Bulletins, leaflets, posters have already been made to promote volunteering in the country.
- Homepage - The main objective is to promote and qualify volunteering by giving general information to the public about legislation, main events, voluntary testimonials, volunteering abroad and overseas, Portuguese and international websites, publications and so on. It was launched in March 2005 in co-operation with the government and CNPV. Volunteers can also search online on where to volunteer.

Finally, it is important to note that in Portugal, the mobilisation of civil society around volunteering has been directed to the action for the fight against poverty. A good example of this is the "Zero Poverty Campaign" that has sought to develop a set of awareness actions to accomplish this goal. These awareness actions are often a driving force for volunteering.

International policies

The issue of volunteering gained a lot of attention during the International Year of Volunteers, established in 2001 by General Assembly of the United Nations, which led to the creation of the National Commission for the Year of the International Volunteer. The spread of initiatives in this area was a major boost from that time on, involving a diverse set of organisations: civil society (non-governmental) organisations (NGOs), organisations in the area of youth, organisations of a religious nature and various charitable social organisations that played a decisive role in promoting volunteering. The first study of the characterisation of Volunteering in Portugal came in 2002, an initiative of the National Commission for the International Year of Volunteers.

2.3 Programmes

Key national programmes that stimulate volunteering at national level

Matching tool for Volunteers and organisations Programme

The purpose of this programme is to serve as a meeting point between demand and supply of volunteer work. This is an innovative project, nationwide, across the entire society and economy, which encourages the exercise of Citizenship and Social Responsibility. It will strengthen a virtual "market" of volunteering; fostering the meeting of needs and wants. It is a tool online in real time that leverages the skills of volunteers and promotes the capacity of organisations.¹⁰

¹⁰ <http://www.bolsadovoluntariado.pt/>

The programme enables institutions and organisations to transform their needs into opportunities through volunteer work. Institutions and organisations that need volunteers, can register online, listing their needs. They may also seek volunteers with the profile they need for their activities, using various criteria.

“Youth Volunteering for the Forest”

The Programme “Young Volunteers for Solidarity” (Progama JVS – Jovens Voluntários para la Solidariedade) was the first officially recognised volunteer programme in Portugal. It was created in 1993 by the State Department for Youth (Ministerial Ruling no. 685/93, 2nd of July and was subsequently reformulated by a Ministerial Ruling no. 745-G/96, 18th of December).

It relates to young volunteers aged from 15 to 30 and covers areas such as the fight against poverty, support to socially excluded groups, education and the prevention of drug and alcohol abuse. The objective of the programme is to encourage the development of and participation in voluntary work by the young, to contribute to their social and cultural training by giving them the opportunity to participate in activities and projects that are useful to both society and the local communities.

Youth volunteering

Information system that aims to promote the development of a volunteering spirit and practices among youth, contribute to their civic and social education, enabling the meeting of youth, of the volunteering project promotional entities and the sponsors.¹¹

The Youth Service includes people between 18 and 30 years. In Portugal there is a body - Portuguese Youth Institute, IP (IPJ) that is responsible for designing, implementing and evaluating government policy for youth, and for encouraging youth participation in all areas of life, through:

- Programs and support for the establishment of Youth Associations and Student; Program OTL - leisure
- Holiday camps and international work camps
- Youth Service Projects in several areas such as support for the elderly, children, sports, among others. (Programs: “Youth Service Forest and Volunteerism in Promoting Energy Efficiency”).

Volunteer Week

ANEVE, National Association of Europeans Ex-volunteers, with the support of the Portuguese Youth Institute IP, and the National Agency for Management of the Youth in Action organised the volunteer week entitled “OPS! - Opportunity to Be a Volunteer” held in December 2009.

The event included:

- Forum discussion: “Volunteering - Sustainable citizenship”
- Exhibition area
- Workshops on volunteering
- Sharing of experiences and animation

¹¹ <http://voluntariadojovem.juventude.gov.pt/>

Voluntary local banks

The National Plan for Inclusion (NAP), 2003-2005, established as a goal under promotion of volunteerism, the creation of voluntary local banks throughout the country, preferably in partnership with local authorities. Generally, and as defined by CNPV, objectives of a volunteer bank are to:

- Promote contact between supply and demand for service;
- Raise awareness of volunteering;
- Disseminate projects and volunteer opportunities;
- Contribute to a deeper understanding of volunteering;
- Contribute to the qualification and training of volunteers.
- In terms of specific objectives, a database of volunteering is able to:
 - Welcome applications from people interested in volunteering
 - Guidance for organisations that promote volunteerism;
 - Provide public information on volunteering.

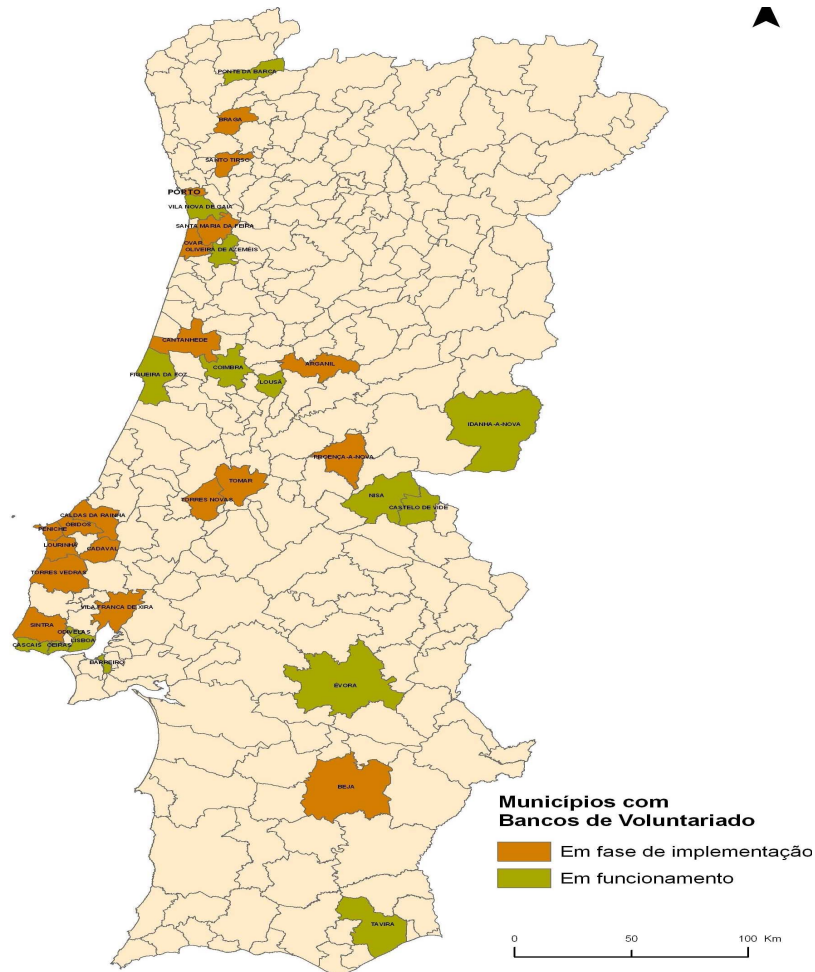
These local banks are designed as an interface between the people who express their readiness and willingness to volunteer and the entities that host volunteers, interested in receiving volunteers.

The CNPV - National Council for the Promotion of Volunteering (composed of representatives of various Ministries) - whose activities began in 2000 and which is currently fully operational, contributes to the qualification and training of national volunteers.

Several municipalities in the country, for example Porto, which since 2001 have chosen the implementation of this type of structure as a way to optimise the use of this important resource. As they are municipalities they are the main facilitators of volunteering at the local level.

In some cases, the creation of the banks results from partnerships between municipalities and voluntary organisations. In this situation, the banks' work can be boosted by voluntary organisations rather than by municipalities (for example, in Santo Tirso is promoted by the Holy House of Mercy Evora by a foundation in Beja Diocesan Caritas). Throughout the country, there are banks of volunteering that are already operating and others that are being implemented. See map below on Figure 2-1.

Figure 2-1 Distribution of voluntary banks in Portugal



Fonte: Conselho Nacional para a Promoção do Voluntariado, 2005

Source: *Voluntariado na Cidade do Porto-Câmara Municipal do Porto (2006)*

Programmes promoting/supporting volunteering at regional and local level

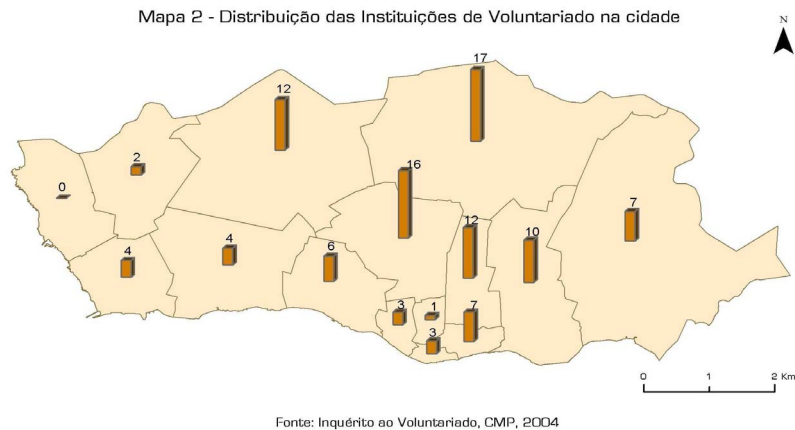
In Porto there are a few associations composed exclusively of volunteers.

In terms of geographical distribution of institutions within the city, there is a greater concentration of voluntary organisations in the city centre: 42% are located in the areas of St. Ildefonso, Bonfim, Cedofeita and Massarelos. It is also worth noting the neighbourhood of Paranhos with 17 voluntary institutions.

The practice of voluntary organisations is understood in Porto to be an expression of civic participation and public involvement in the activity of the city.

The presence of voluntary organisations in the city of Porto is greater than the national average.

Figure 2-3 Distribution of Voluntary organisations in Porto



Source: *Volunteering inquiry, CMP, 2004*

Programmes promoting/supporting volunteering at transnational level

The “Regulamento do Programa Lusíadas nº745 - H/96 de 18 Dezembro”, establishes the legal framework for the development of **international volunteer programmes** for young people in co-operation with the “CPLP countries” (Community of African Portuguese Speaking Countries). Volunteers under this programme must:

- Be aged between 18 to 30 years;
- Hold Portuguese citizenship or be a national of one of the countries involved in the programme with legal residence in Portugal;
- Have undergone at least obligatory basic education.

The programme involves volunteer activities carried out in a number of different sectors such as health, education, professional training, natural, historical and cultural heritage, establishing of libraries and centres for the promotion of the Portuguese language, promotion of youth associations, social integration, scientific and technological research and collaboration, and support for projects and actions related to urgent humanitarian relief.

3 REGULATORY FRAMEWORK

3.1 General legal framework

*Specific legal framework which exists with respect to volunteering*¹²

There are different laws and regulations in Portugal related to volunteerism, namely:

- “Regulamento do Programa Jovens Voluntários para a solidariedade nº745- G/96 de 18 de Dezembro” 1996;
- “Regulamento do Programa Lusíadas nº745 - H/96 de 18 Dezembro” 1996;
- “Lei n.º 71/98 de 3 de Novembro”, establishing the basic legal framework of volunteerism in Portugal 1998;
- Decreto-Lei n.º 40/89, de 12 de Fevereiro - Institutes the voluntary social insurance, a facultative contributive regimen in the scope of the Social Security;
- “Decreto-Lei n.º 389/99 de 30 de Setembro”, of the Ministry of Labour and Solidarity, developing the contents of the latter framework law “Lei n.º 71/98” 1999;
- Resolução de Conselho de Ministros n.º 50/2000 (publicada no D.R., II série, n.º94, de 20 de Abril) - Defines the composition and the functioning of the National Council for the Promotion of Volunteering;
- Portaria n.º 87/2006, de 24 de Janeiro - Approves the Identification Card of the Volunteer.

With the Law 71/98, volunteering was recognised by the Portuguese government as a way of expressing citizenship. It establishes the legal framework in volunteering in Portugal- it defines:

- What volunteering is
- Volunteer
- Host organisation

Rights and duties of volunteers

The law was adjusted by a Law-decree 389/99- this adjustment covers:

- Issuing volunteer identification cards
- Volunteers' insurance
- Volunteering program (a kind of contract established between the volunteer and the organisation in which he/she is going to perform the voluntary activity)

The Portuguese Law on Volunteerism –“Lei Nº71/98 De 3 Novembro” 1998

The regulation developing the contents of the Framework Law 71/98 of the Portuguese Ministry of Labour and Solidarity establishes a series of operative instruments aimed at facilitating and ensuring the effective exercise of volunteers' rights. Among other issues, the Law-Decree describes:

- The organisations legally allowed to recruit and co-ordinate volunteers;
- The procedure for the issuing of volunteer identification cards;

12 CEV/AVSO, Country report on the legal status of volunteers in Portugal, 2005

- The conditions and procedures necessary to ensure that volunteers are covered under the volunteer social insurance framework. For example, it describes the organisation's responsibility to pay for corresponding social security contributions and to protect the volunteer under an obligatory collective insurance.

The Portuguese Law on Volunteering, "Lei nº 71/98 de 3 Novembro", aims to promote and guarantee to all citizens the right to participate in volunteer activities, and defines the basic legal framework under which volunteering should be developed. The law recognises that volunteer action is one of the basic instruments for the participation of citizens in society and acknowledges the freedom and flexibility inherent in volunteer activities

3.2 Legal framework for individual volunteers

Volunteers have the following rights, under the Portuguese Law on Volunteering:

- To access initial and ongoing training;
- To receive a volunteer identification card;
- To be included in the social security voluntary framework;
- To work under proper health and safety conditions;
- To be absent from their volunteer duties with due justification without losing any of their volunteer rights and benefits;
- To receive economic compensation, pensions and corresponding benefits in case of accident or illness related to their volunteer activity;
- To have their volunteer programme established under an agreement with the organisation regulating their mutual relations as well as the nature, contents and duration of the volunteer project;
- To be actively involved in the design of their programme;
- To benefit from special conditions for the use of public transport as volunteers;
- To be reimbursed for their duly justified expenses within the limits that have been established by the volunteer organisation itself.

The duties of the volunteer are:

- To respect the deontological principles of the activity they perform and the private life of their beneficiaries;
- To follow the rules governing their organisation and those set forth for the development of their projects;
- To participate in the training related to their volunteering;
- To make proper use of the material resources that are put at their disposal;
- To collaborate with their professional colleagues, respecting and following their decisions;
- To officially represent their organisations only when they have been expressly authorised to do so;
- To make proper use of their volunteer identification

Different duties and rights depending on the programme, for example volunteers participating in the "Lus íadas" programme must:

- Respect the deontological principles inherent to his/her specific activity;

- Follow the guidelines provided by the organisation managing the volunteer project;
- Abstain from any behaviour that may have a negative effect on the relationship between the volunteer organisation, the Portuguese State and the hosting State;
- Undergo the obligatory training organised by the organisation.

Provisions for specific categories

Voluntary Service Abroad and Family Allowances

Whenever a dependent child or a young person engages in voluntary activity abroad, the beneficiary – generally his/her family - will lose entitlement to family allowances.

The reason for this is the failure to comply with the basic requirement of “residence” of the child or young person with the beneficiary of the allowance.

Voluntary Service Abroad and Unemployment Benefits

Unemployment benefits are suspended during periods of voluntary service abroad. Those benefiting from unemployment allowances must advise their local social security institutions of their departure. Upon their return, volunteers must undergo a further administrative procedure before recuperating their unemployment benefits. The whole process can take about a month or two. The organisation has to cover the costs of the volunteer in terms of a social pension.

Support schemes and incentives

The above-mentioned framework law on volunteerism states that volunteers must always be guaranteed proper health and safety conditions at work.

Volunteers and the State Social Security System

The framework law on volunteerism guarantees coverage under the social security system of all volunteers in Portugal. Volunteers have the right to be included by the organisations for which they volunteer in the voluntary social security scheme and where they are not; they should be covered by the compulsory scheme. The optional scheme does not guarantee full social security protection, but gives entitlement to deferred benefits, for example disability, old age and death.

Taxation rules

In Portugal, a person's social security and tax status depends on the nature of the activity and his/her relationship with the organisation for which they volunteer.

As long as the “volunteer” and “volunteer organisation” relationship is maintained in accordance with the law, no employment relationship will exist between them.

Volunteer organisations and volunteers should not therefore be subject to obligatory social security contributions or taxes concerning the reimbursement of out-of-pocket expenses or other subsistence support for volunteers such as pocket money, board and lodging.

3.3 Legal framework for organisations engaging volunteers

According to the Portuguese law, volunteers and the organisation for which they volunteer must agree on the specific rules and conditions applying to the particular volunteer project, including the nature and scope of the activity to be undertaken and the means to solve any eventual conflicts that may arise between them.

The condition of being a volunteer is compatible, under Portuguese law, with that of an associated partner, member and beneficiary of the same volunteer organisation

3.4 Legal framework for profit-making organisations

Project Hand in Hand or GIRO

An enterprise movement for volunteering, led by PT Communications brings together 17 companies to participate in solidarity activities. The companies commit themselves to make their workers available to develop initiatives, during their normal work schedule, without any loss of inherent benefit of payment and benefits. Each company has the responsibility to assure the necessary logistics for the concretion of the activities assigned to them as well providing the necessary resources.

3.5 Insurance and protection of volunteers

The regulation developing the contents of the Framework Law 71/98 of the Portuguese Ministry of Labour and Solidarity establishes a series of operative instruments aimed at facilitating and ensuring the effective exercise of volunteers' rights. Among other issues, the Law-Decree describes the conditions and procedures necessary to ensure that volunteers are covered under the volunteer social insurance framework. For example, it describes the organisation's responsibility to pay for corresponding social security contributions and to protect the volunteer under an obligatory collective insurance.

4 ECONOMIC DIMENSION OF VOLUNTEERING

4.1 Funding arrangements for volunteering

Sources of funding for voluntary organisations

Earned income (fees and sales) is the dominant source of civil society organisation revenue in Portugal, followed closely by public sector support. Philanthropy, by contrast, is a distant third. More specifically:

- Earned income. **Nearly half** (48 percent) of all civil society sector revenue in Portugal comes from service fees and sales;
- Government support. Government grants and contracts account for another **40 percent** of civil society sector revenue in Portugal. This reflects mostly the government's reliance on non-profit organisations in social service provision, as well as the heavy public-sector support to the private health and education institutions that exist.
- Private philanthropy. Only **12 percent** of total civil society organisation income in Portugal comes from private philanthropy.

This figure would be even smaller if religious organisations were excluded, as in other countries.

In Porto the main financial sources for voluntary organisations come from the state (66%) followed by the contributions of members (58%). Also 51% of the organisations receive donations from individuals as an important source of funding. These institutions are clearly dependant on state funding which is related to the fact that most of institutions are IPSS (Private Institutions of Social Solidarity) and therefore highly dependent on state support.¹³

13 Voluntariado na Cidade do Porto-Camara Municipal do Porto (2006)

The same situation is mirrored in the national study which states that "more than half of the institutions are maintained by the State in order to ensure more than 50% of their budget" (ICS, UNL, 2002, p. 53).

4.2 Economic value of volunteering

Income generated through volunteering

Close to half (48 percent) of the revenue of Portuguese non-profit organisations comes from fees and sales, followed closely by public sector support (40 percent);

Economic value of volunteering

The National Council for Volunteering Promotion has no information about the economic value of volunteering in Portugal because of the recent development of volunteering in the country.

The public perception within Portugal is that Portugal has a "weak" civil society sector. The data collected here seem to confirm this perception, at least when Portugal is compared to other European Union countries. However, the civil society sector still constitutes a larger part of the economy in Portugal than is widely recognised.

According to the results of the JHU study, Portugal's civil society sector is a significant economic force:

- It had expenditures as of 2002 that represented 4.2 percent of the nation's gross domestic product (GDP);
- It engages the energies of nearly a quarter of a million full-time equivalent workers, two thirds (70 percent) in paid positions and the remainder as volunteers;
- Non-profit organisations thus employ more people in Portugal than a number of sizable industries, such as utilities and transportation.

Volunteers represented 67,342 FTE in 2002.

Volunteers significantly change the revenue structure. This picture of non-profit sector revenue changes substantially when the value of volunteer input is included and treated as part of philanthropy

The value of volunteer time nearly doubles the share of private philanthropy from 12 to 21 percent. However, even with the value of volunteering included, philanthropy still ranks third among the major sources of civil society sector revenue in Portugal; and the Portuguese figure still remains below the developed country average (21 percent vs. 28 percent).

Value of volunteering work as a share of GDP¹⁴

The value of volunteer effort alone, estimated at €675 million euro contributes more than **0.5 percent to the nation's GDP**. The value of volunteer effort was calculated by assigning to the volunteer hours an hourly wage equivalent to that given in the field of health and social work.¹⁵

Portugal's participation in the international project of Johns Hopkins University allows the characterisation of the national third sector in comparative perspective. According to this study the Portuguese case presents the following data: the contribution of the society

14 http://www.ccss.jhu.edu/pdfs/CNP/CNP_Portugal_Nat_Rpt.pdf

15 The Portuguese Nonprofit Sector in Comparative Perspective. (Porto : Universidade Catolica Portuguesa / John Hopkins University)

calendar for the economy (in terms of composition of the workforce) is quantified 4.2% of GDP and on the "value of volunteer effort" this in itself contributes more than 0.5% of GDP.

According to recent data, the contribution of this sector of society in the economically active population of Portugal is nearly 4% compared to the average of the other countries in the study (5%). The countries that show the greatest percentage of workers in this sector of civil society, in comparison to all their economically active population, are the Netherlands (14%), Canada (11%) and Belgium (11%).

Issues of service substitution and job substitution

The lack of financial resources that these organisations suffer from continuously leads them to recruit more volunteers than permanent staff, a problematic development as clearly volunteering should not replace paid labour. The permanent struggle for funding also limits and narrows the scope of their activities, especially concerning the design of long-term work strategies.¹⁶

The presence of volunteers in institutions varies depending primarily on the type of organisation considered. At one extreme, there are the fire brigade volunteers and the Red Cross delegations, largely dependent on voluntary work, at the other extreme, there are numerous private institutions such as Social Security, where the number of volunteers (with the exception of management positions) is very low.

The smaller institutions, targeting the most marginalised groups and receiving less support, are the ones which use more volunteers. "Volunteering can thus be perceived in many cases, as a labour force that, replaces paid specialised professionals "when there is not enough funding".

Most institutions surveyed find it difficult to recruit new volunteers confirming that the recruitment is done mainly through social networks and to a lesser extent through the use of campaigns (street, pamphlets, media) or through institutions/.

5 SOCIAL AND CULTURAL DIMENSION OF VOLUNTEERING

5.1 Key benefits for volunteers, the community and direct beneficiaries

In terms of volunteering and companies, the project on corporate volunteering in the Portuguese context carried out by the Foundation Manuel Leon, entitled "Volunteering and Business: an exploratory study of the Portuguese" (2001) identified several benefits of corporate volunteer programs at the level of employees¹⁷:

- Increase and improvement interpersonal relationships;
- Provide another perspective on the role of everyday work;
- Allow the acquisition of knowledge of new social realities;
- Generate personal satisfaction;
- Increased self-esteem;
- Increased confidence in personal abilities

16 CEV/ AVSO, Voluntary Action in Portugal, Facts and Figures, 2005

17 How to implement volunteering projects in companies-GRACE (2006)

- Stimulating creativity
- Development and putting into practice new skills;
- Allow the development of personal interests

The results of a survey conducted among Portuguese companies show that the skills developed through involvement in voluntary activities are valued by the companies, such as:

- Certain professional recruitment practices, in particular, those relating to the level of young candidates with little training experience ;
- Skills in teamwork;
- Entrepreneurship;
- Interpersonal relationships;
- Leadership;
- Problem solving;
- Practices acquired through involvement in certain voluntary actions (e.g., development of co-operation, solidarity and social economy, education and training, sport recreational activities);
- Performance of official duties in the service sector;
- Pursuit of leadership / co-ordination.

5.2 Factors that motivate individuals to volunteer

After the study elaborated for the International Year of volunteering it was possible to characterise Portuguese volunteers' motivations as follows¹⁸:

- 75% -Desire to become useful
- 66% - Solidarity with the poor
- 54% - Contributions made to the community
- 23% - developing skills
- 21% - Meeting people
- 12% - Gaining information
- 10% -acquiring prestige and social recognition
- 3% - Holding a position of power.

18 "O voluntariado"-Instituto de Solidariedade Universitaria (Institute of university solidarity)

6 VOLUNTEERING IN THE CONTEXT OF EDUCATION AND TRAINING

6.1 Recognition of volunteers' skills and competences within the national educational and training system

The national system of Recognition, Validation and Certification of Skills (Reconhecimento, Validação e Certificação de Competências – RVCC), set up in 2001,¹⁹ targets adults over the age of 18 and aims at the recognition and formal validation of knowledge, abilities and skills that have been acquired through both non-formal and informal ways as a result of life and work experience. The RVCC process is a “single integrated process”, whose purpose is to provide adults with educational certification.

To this end and in accordance with Despacho Conjunto (Joint Ministerial Order) n.º 24/2005²⁰, of 10th January, the System's specific goals are:

- to recognise the skills and competences acquired by adults in different life contexts;
- to validate and certify prior learning and skills by attributing the equivalent to an educational qualification, thus encouraging better professional performance, promoting career progression and facilitating subsequent education and training routes;
- to promote conditions that will ensure employed adults have access to the information, guidance and support they need for building education and training routes;
- to enable the completion of unfinished training routes and, therefore, skills certification, by means of supplementary training scheme.

However the texts do not refer to volunteering. Volunteering is not yet recognised in Portugal as a competence within the national system of validation and certification, neither in the “prior learning”.²¹

6.2 Education and training opportunities for volunteers

Volunteers have the following rights, under the Portuguese Law on Volunteering, to access initial and ongoing training.

7 EU POLICIES AND VOLUNTEERING

EU Education and training policy

There has been significant activity in the sphere of validation of informal and non-formal learning in Portugal, in response to the qualifications deficit of the adult population and the impetus of European Community guidelines. National systems have been put in place for the validation of informal and non-formal learning acquired through life experiences, which have engaged a great number of individuals, particularly since the introduction of the Novas Oportunidades initiative in 2005.

19 <http://cdp.portodigital.pt/repositorio-de-legislacao/2/>

20 <http://cdp.portodigital.pt/repositorio-de-legislacao/16/>

21 Communication with Banco Local de Voluntariado do Entroncamento

8 CHALLENGES AND OPPORTUNITIES FOR VOLUNTEERING

8.1 Challenges for volunteering

Although democracy has recently stimulated the development of non-profit institutions in Portugal, their influence has been confined to a relatively narrow field of activity, primarily provision of social services.

This sector, therefore, faces a number of critical challenges:

- Recruitment of skilled volunteers;
- Need to strengthen the legal framework;
- Lack of data;
- Perceptions and prejudices;
- Need to strengthen volunteering infrastructure.

Recruitment

The Internet has clearly become the major tool for recruitment. Another feature seems to be the preference for volunteers or internees that have been in the organisation before. However self-proposal assumes a special relevance in the case of volunteers. Nevertheless the selection mechanism is becoming more objective and based on CV (Curriculum Vitae) analyses (more often in the case of paid staff) and interviews (more often in the case of volunteers). The main selection criterion has been the candidate's ability to identify with the organisation's philosophy and principles as well as the professional experience of the candidate in the particular interest area. Age is considered one of the less important recruitment criterions.²²

Most of NGOD's human resources have a university degree, but this seems not to be enough. Organisations are demanding extra skills covering other domains like English, informatics, project management, project evaluation, financial and administrative management, establishment of international relations and social cultural animation skills. It is imperative that NGODs give special importance to human resource qualifications and that they are capable of providing them with specific and up to date information on the level of:

- Knowledge about the countries they are going to work in, namely the historical, social, cultural, economical and political atmosphere;
- Formation on community and local development intervention;
- Formation on evaluation systems and empowerment;
- Reinforcement of communication skills;
- Formation on specific technical skills.

The lack of qualified human and financial resources is a common problem in Portugal, and this is having a great impact on the progress of voluntary work and the Third Sector. Volunteers complain about the lack of benefits and financial help given to them in their work. They also ask for a more favourable volunteering legislation, including fiscal exemptions, medical insurance, and time counting for retirement.

22 CEV/AVSO, Voluntary Action in Portugal, Facts and Figures, 2005

Legal framework

The legal framework applying to volunteers in Portugal may, in general terms, be considered quite an appropriate one. It is flexible and comprehensive, covering many important features of volunteerism, such as the basic rights and duties of volunteers and the organisations for which they volunteer, and establishing state financial and technical support for volunteer projects.

However, there are still “gaps” that hinder the engagement and mobility of volunteers in full time voluntary service programmes other than the state-run “Lusíadas” and “Young Volunteers for Solidarity” programmes. Volunteers within many other private initiative programmes act in a legally uncertain environment and are not entitled to state support, for example, pension contributions for the period during which they volunteer abroad. In addition, the legal category of “volunteer” is not recognised insofar as volunteers coming to Portugal from abroad are concerned. Volunteers are instead issued either student or trainee visas.²³

Lack of data

Volunteering is still an evolving phenomenon in Portugal and therefore, there is still a lot of work to be done in this field. More research needs to be conducted in order to update facts and figures on volunteering in Portugal, since the last national study was in 2001.

There is no information about the economic value of volunteering in the country and it is not possible to accurately assess the financial contribution made by volunteers to the gross domestic product (GDP).

Perceptions

In Portugal the most recent studies available on voluntary work and the third sector were carried out in 2001. Obviously this does not provide an accurate picture of volunteering and the non-profit sector in general.

Traditionally, voluntary work was associated with organisations with a religious basis, and it was mainly focused on charity work. Nowadays volunteering has started to also be connected with social support, solidarity, defence of equal rights and environmental issues. Although the attitude on volunteering in the Portuguese society has become far more positive the country still has the lowest rates of voluntary work in Europe. In 2001 only 12.7% of Portuguese population was engaged in volunteering activities. During the period from 1990 to 1999 Portugal was the European country with the lowest level of social engagement. The only positive variation was for organisations related to peace movements (0.5% in 1990 to 0.6% in 1999) and to co-operation for development (0.6% in 1990 to 0.8% in 1999).

The fact that Portugal had a low rate of voluntary work compared with the rest of Europe can be attributed to the late acquisition of the right for free association and to the fragilities of the political system.

However, most of the studies have shown that volunteering is starting to consolidate in Portugal due to people’s growing awareness of social problems and to active citizenship.

Infrastructure

Volunteer Centres themselves are only an emerging reality. This movement will be strengthened and therefore, will surely lead to better promotion and visibility of volunteering which will lead to it being more effective. The example of Portugal highlights the fact that a

23 CEV/ AVSO, Country Report on the Legal Status of Volunteers in Portugal, 2005

lack of volunteering infrastructure leads to a relatively weak interest and participation of citizens in volunteering.²⁴

8.2 Opportunities for volunteering

The potential of volunteering when it comes to social inclusion, social cohesion, and the acquisition of skills and the promotion of active citizen's participation is still not tapped sufficiently and the newly created volunteer centres will most certainly play a crucial role in developing these social values. The creation of a volunteer infrastructure will hopefully lead as well to more updated data on the volunteering landscape in Portugal: This report is based mainly on data collected in 2001 or even earlier – but to understand and effectively support voluntary work reliable and up to date data is needed.²⁵ These are some of challenges the volunteer landscape in Portugal currently faces:

- The reinforcement of local intervention and citizen participation via local volunteer centres;
- The development of a network between volunteer centres and volunteer involving organisations and NGOs throughout Portugal;
- The implication of Portuguese volunteer centres at the European level;
- A strategy of auto-sustainability for all organisations;
- A new approach relating to human resources specially giving more support to volunteers and strengthening contractual ties with paid staff;
- A more favourable legal framework for volunteering;
- Promoting a discussion platform between all organisations and the Portuguese State;
- A more pro-active recognition by the state of the important role volunteering plays in society and its promotion with Portuguese citizens.

Increasing public awareness

One useful step in this direction will be to draw more explicitly the links that exist among the different types of organisations that comprise the non-profit sector and between them and the co-operatives and mutualist associations that help form what is known as the “social economy.” A clearer understanding of the commonalities among non-profit organisations and between them and these other components of social economy will generate a more enabling political environment for the sector as a whole. So, too, will the kind of data generated by the research undertaken here.

Strengthening the legal framework

With the rapid expansion of the civil society sector that has occurred in the past 30 years, the laws and regulations governing it have increased in number and complexity.

All of this has produced a diffuse and confusing body of laws governing the formation and operation of different types of organisations. This causes considerable confusion and creates a lack of understanding about the legal framework, which diminishes the impact of the non-profit sector in Portugal.

To remedy this, Portugal could usefully undertake some consolidation of its civil society legal structure. This could involve systematising the legal forms of organisations and

24 CEV/AVSO, Voluntary Action in Portugal, Facts and Figures, 2005

25 CEV/AVSO, Voluntary Action in Portugal, Facts and Figures, 2005

promoting greater consistency in the tax treatment of the organisations and of the charitable contributions to them. This would help to reassure donors, simplify the administration of laws, and potentially encourage greater transparency and accountability on the part of organisations.

Improving the capacity of voluntary organisations

The perception of Portugal's non-profit employees as "missionaries" or "professional volunteers" is used to justify low wages and long hours, especially in Private Institutions of Social Solidarity. This leads to low retention as more qualified workers leave social institutions for public or private for-profit ones. In an era of a considerable dependency on state subsidies and European support, a growing number of Portuguese civil society organisations are increasingly aware of the need to professionalize the management of their institutions in order to guarantee the best service possible for their beneficiaries.²⁶

Improving relation with the state

The relationship between state and civil society has improved dramatically in the years since the overthrow of the authoritarian regime. At the same time, some ambiguity appears to remain about which functions the state should not only finance but also perform, and which functions it can rely on civil society organisations to carry out with state support. Similarly, there remains uncertainty both on the part of the civil society sector and the public at large about the appropriateness of civil society's co-operation with the state, and about how to preserve a meaningful degree of autonomy for civil society while pursuing co-operation between the state and civil society groups.

Fortunately, there is considerable experience in Europe on these matters that Portuguese policymakers, civil society leaders, and researchers could usefully examine. More fundamentally, there is a need for a serious rethinking of state activities to determine which can be carried out more flexibly and effectively through public-private co-operation than through state action alone.²⁷

26 The Portuguese Nonprofit Sector in Comparative Perspective, 2005

27 The Portuguese Nonprofit Sector in Comparative Perspective, 2005

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