

COUNTRY PROFILE

PORTUGAL

Last profile update: June 2011

This profile was prepared and updated by Mr. Rui Telmo Gomes and Ms. Teresa Duarte Martinho (Lisbon).

It is based on official and non-official sources addressing current cultural policy issues.

The opinions expressed in this profile are those of the author and are not official statements of the government or of the Compendium editors.

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PORTUGAL¹

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1. Historical perspective: cultural policies and instruments

There have been four key periods in the development of cultural policy in Portugal over the last 60 years.

Up until the revolution of 25 April 1974, Portugal had an authoritarian regime. In addition to restricting democratic rights and enforcing censorship, it was a regime which limited both cultural and artistic endeavour and contact with cultural trends and experiments taking place in other countries, particularly those in Europe.

Following the democratic revolution of 1974, the *Constitution of the Portuguese Republic* enshrined (in *chapter III, Article 73*) the state's duty to promote the democratisation of culture. As other rights such as health and education were gradually consolidated, constitutional governments increasingly turned their attention to culture, albeit in a still rather unsystematic fashion, and with culture not being an independent area of ministerial responsibility.

The Thirteenth Constitutional Government established the Ministry of Culture in 1995, with autonomous departments assigned to defining policies for the sector. There were five main aspects to this Ministry's strategy: books and reading; heritage; creative work in the arts; decentralisation, and internationalisation. All six governments in office after 1995 (there have been 8 ministers of culture to date) followed a trend of establishing partnerships between central and local government, with a view to setting up cultural facilities – libraries and cinema-theatres – throughout the country. At the same time, and after a period of more vigorous activity, governments gradually began to disinvest in the field of culture, in terms of both funding allocations and the development and implementation of integrated strategies for the sector.

In 2006, as part of the reforms which took place under PRACE (the Seventeenth Government's Programme to Reform the Central Government Administration), the Ministry of Culture underwent significant reorganisation. This reorganisation was implemented as a rationalisation of resources, and basically involved a reduction in the number of departments through the merging or abolition of some of them – with a resulting loss of independence for sectoral policies. The Nineteenth Government (in office since June 2011) took this trend further, downsizing the administrative structure of the Ministry of Culture to a Secretary of State.

2. General objectives and principles of cultural policy

2.1 Main features of the current cultural policy model

Cultural policy in Portugal is the remit of the Ministry of Culture and has mainly been based on a centralised model. Among the "peripheral services administered directly by the State", there are five Regional Culture Directorates (North, Centre, Lisbon and Tagus Valley, Alentejo and Algarve) whose aim is to distribute the Ministry's responsibilities more widely and whose missions, in conjunction with the Ministry's main departments, are to: "ensure public access to cultural resources, to monitor the activities of cultural producers funded by the Ministry of Culture, and to monitor heritage conservation measures" (*Regulatory Decree 34/2007* dated 29 March 2007). Regional Culture Directorates are administratively autonomous.

This is a cultural policy model which tends to be interventionist, with differing degrees of intervention according to the field of cultural and artistic endeavour concerned. Thus in the culture industries (cinema, audiovisual, book publishing), the Ministry of Culture's role is essentially that of a regulator. In the case of performing arts, the traditionally more interventionist role of the Ministry has been in retreat, with progressively less investment in Ministry-supervised production and artistic facilities. There has also been a retreat in the heritage sector, in which the Ministry of Culture has traditionally intervened most extensively, reflected in the merging of institutes in this domain.

It should be noted that the government's retreat from supervision of the cultural sector is also evident in other ways – first of all in the form of budgetary restrictions and the gradually reducing organisational structure of the Ministry of Culture as factors which contributed to its relative decline as a cultural actor. Thus the greater investment by local authorities in the domain of culture turned them into key players in terms of cultural policies (see chapter 3.2). In turn the main cultural entities in the third sector continue to intervene in the cultural field – of particular importance here are the Gulbenkian Foundation, the Serralves Foundation and the Luso-American Foundation. The cultural activities of other ministries should also be taken into account, such as the Ministry of Education (in book publishing and reading), the Ministry of Economics (in the creative industries, including tourism), the Ministry of Foreign Affairs (in language, see chapter 3.4) and the Ministry of Public Works (in the heritage field).

2.2 National definition of culture

The Ministry of Culture defines culture as "an indispensable element in developing intellectual capabilities and the quality of life, important as a factor in citizenship and a key instrument for a critical understanding and knowledge of the real world" (in http://www.portaldacultura.gov.pt/ministeriocultura. Accessed 15 November 2010).

2.3 Cultural policy objectives

The main manifesto commitments of the Eighteenth Government (October 2009 – June 2011) were:

- to increase the culture budget during the life of the present legislature, so as to fund adequately the full development of public policies for the sector;
- to ensure coordination of cultural policies across all ministries and departments involved in sectoral policies relevant to culture; and

• to strengthen and improve the key contribution of modern creative art to the country's development, encouraging the formation of networks and partnerships and the increased diversity of cultural practices, by means of clear policies in support of artists, educating audiences and achieving greater interaction between culture, science and education. Three areas are emphasised in particular: Language, Heritage and the Arts and the Creative and Cultural Industries.

As far as endowing the country with cultural facilities and networks is concerned, it should be noted that this objective of cultural policy was initially implemented by means of investment in the creation and restoration of cultural infrastructures. More recently, greater emphasis has been placed on extending public access to cultural events and facilities.

As the Nineteenth Government is entering office (June 2011) the most relevant strategic policy objective stated is to "evaluate the State's involvement in cultural life and reduce its administrative apparatus" (from the Government Programme). Some other general objectives are stated, such as the support to historic and intangible heritage, creative industries and the arts. The literature and libraries sector, as well as the language policy, are also given priority.

3. Competence, decision-making and administration

3.1 Organisational structure (organigram)

Public sector

CENTRAL GOVERNMENT

The Ministry of Culture and its departments develop and implement cultural policy, award sectoral funding to cultural and artistic bodies, design, co-ordinate and implement specific (national and European funded) programmes, and manage organisations involved in artistic creation and production, such as the major national theatres (see chapter 2.1 and chapter 2.3)

Private sector

Development of cultural and artistic activities, some regulated by the government – for example, the fixed pricing of books – and some also receiving financial support from the Ministry of Culture. Some larger corporations also provide sponsorship support to bodies supervised by the Ministry of Culture (such as the major national theatres).

CULTURAL FACILITIES NETWORKS

Libraries, cinema theatres, museums, archives. Responsibilities are shared and co-ordinated between central government (the ministry) and local government (councils), by means of partnerships.

LOCAL GOVERNMENT

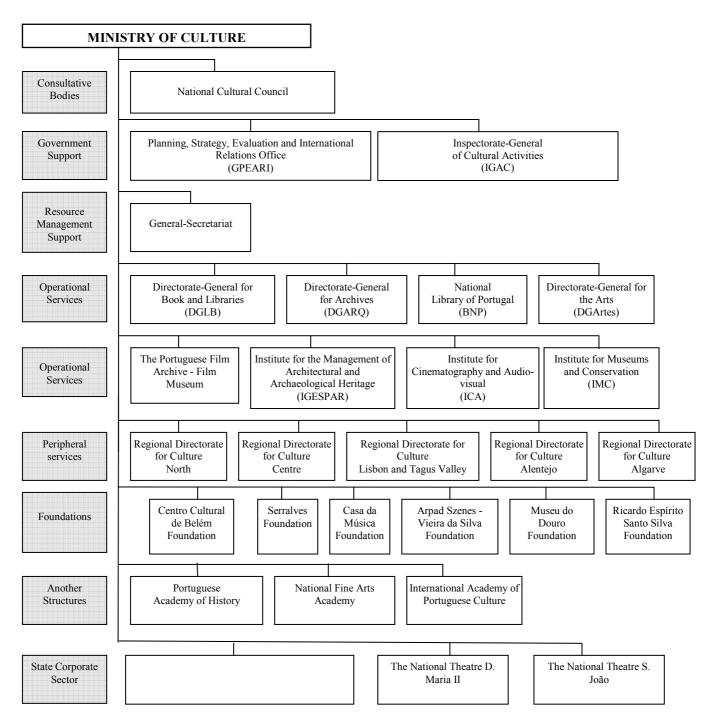
Local councils and culture departments define and implement local culture policy as part of their responsibilities in the cultural field (see chapter 5.1.2).

Third sector

Associations – These are mainly supported out of public funds.

Foundations – the larger ones have their own cultural programmes and at the same time support other cultural and artistic organisations (some of which also receive support from central government).

Internal organisation of the Ministry of Culture



Note (July 2011): This structure is to be replaced by a Secretary of State for Culture within the Nineteenth Government appointed in June 2011.

3.2 Overall description of the system

The administration of the country has three levels: central administration, municipal administration and the autonomous regions of the Azores and Madeira which have been granted their own special political administrative status and political organs. The central government – in this case the Ministry of Culture – is the body which has the highest level of responsibility for defining and implementing cultural policy.

It should be mentioned, however, that culture has become increasingly important in the management of local public affairs – although not all councils are equally invested in the cultural field. Looking at culture as a proportion of the local councils' overall budgets, it can be observed that not only has there been an absolute increase in expenditure on culture since the end of the 1980s, but that culture also accounted for an increasing portion of total expenditure. Also notable are the number of partnerships, and the resulting sharing of responsibilities, between central government and local councils. These partnerships were set up to establish and develop networks of cultural facilities, like the National Public Libraries Network (*Rede Nacional de Bibliotecas Públicas* – RNBP) in 1987, the first network launched by the Ministry of Culture, and the Portuguese Museums Network (*Rede Portuguesa de Museus* – RPM), in 2000.

Apart from the departments of the Ministry of Culture and local councils, some foundations play a significant role in cultural policy, by reason of the support they give to culture and the arts, the events they organize, and the cultural initiative agreements they make with the Ministry of Culture.

3.3 Inter-ministerial or intergovernmental co-operation

The Ministry of Culture has entered into various agreements with other ministries, in order that inter-ministerial co-operation may be of real benefit to the government's policy action in the cultural field. The main examples are:

- The National Reading Plan (*Plano Nacional de Leitura* PNL), launched in 2007 with the aim of increasing Portuguese literacy levels, is a government initiative, under the auspices of the Ministry of Education, in co-operation with the Ministry of Culture and the Office of the Minister for Parliamentary Affairs. In the first phase of this Plan (2007-2011) the Education and Culture ministries have carried out joint action and training programmes.
- The Directorate-General for the Arts, supervised by the Ministry of Culture, and the Camões Institute (*Instituto Camões*), jointly supervised by the ministers of Foreign Affairs and Culture, adopted a memorandum of Understanding in 2008, the aims of which were to ensure funding for Portuguese artists and foreign artists resident in Portugal to take part in events taking place outside Portugal, as well as to provide support to foreign organisations established in the international art world which might wish to invite Portuguese artists or bodies to take part in international events.
- In November 2010, the Foreign Affairs and Culture ministries signed an agreement aimed at strengthening institutional co-operation between the Camões Institute and the Ministry of Culture's Office of Planning, Strategy, Assessment and International Relations (GPEARI). The aim of this partnership is to co-ordinate the actions of the two organisations.

Collaboration between the ministries of Culture and Education has taken the form of joint project and working groups to develop linkages between cultural and educational polices – particularly in respect of measures to encourage participation in cultural life. The results of these attempts at coordinated action have been disappointing.

3.4 International cultural co-operation

3.4.1 Overview of main structures and trends

International cultural co-operation has mainly focused on the promotion of Portuguese language and culture. Hence the extensive co-operation with countries whose official lan-

guage is Portuguese, through both the Camões Institute and international platforms such as the Community of Portuguese-Speaking Countries (*Comunidade de Países de Língua Portuguesa* – CPLP), which includes Portugal, Brazil, Angola, Mozambique, Cabo Verde, Guiné-Bissau, S. Tomé and Príncipe and East Timor). In November 2008 this organisation issued a Declaration following an Extraordinary Meeting of CPLP Education and Culture ministers. The objective: to encourage the appreciation and use of the Portuguese language internationally, starting out by appealing to member states to implement the Spelling Agreement signed in Lisbon in December 1990. Portugal began applying the Spelling Agreement in 2010, the aim of which is to encourage the use of the Portuguese language internationally and implement a common set of rules in the signing countries

Portuguese language and culture are also disseminated by means of television and radio. Television: RTP International (RTP-I, since 1992) and RTP Africa (RTP-A, since 1998), broadcast in all Portuguese-speaking African countries except Angola. Radio: RDP Africa, the broadcaster of Portuguese Radio to lusophone African countries.

International cultural cooperation also includes the exhibition of works of art in other countries (participation in festivals, biennial exhibitions and other international fairs), as well as major events organised in Portugal itself – like Porto 2001 Capital of Culture, and Guimarães European Capital of Culture in 2012.

3.4.2 Public actors and cultural diplomacy

The Camões Institute plays a key role in cultural diplomacy in Portugal. This public institute, which is administratively and financially independent, having its own asset base, operates in the fields of culture and teaching. Its mission is to put forward and implement policy proposals for the dissemination and teaching of Portuguese language and culture abroad and to promote Portuguese as a language of international communication. In its European aspects the Camões Institute is a member of EUNIC (European Union National Institutes for Culture) and EFNIL (European Federation of National Institutions for Language), and develops partnerships for joint action.

The mechanisms for awarding funding for international events were recently changed in line with the November 2010 agreement between the ministries of Foreign Affairs and Culture. This agreement established the institutional co-operation and information exchange between the Camões Institute and the Ministry of Culture's Office of Planning, Strategy, Assessment and International Relations (GPEARI) related to the international promotion of Portuguese culture (see chapter 4.2.1). It also stated that the financial support by Camões Institute to the presentation of Portuguese artists in foreign countries, which had been interrupted in 2010.

3.4.3 European / international actors and programmes

In the previous community support framework there was a specific programme for culture, as for other sectors, called the Operational Programme for Culture (POC - *Programa Operacional da Cultura*), in which the Ministry of Culture was heavily involved. The current (2007-2013) National Strategic Reference Framework (*Quadro de Referência Estratégico Nacional* – QREN) does not have these sectoral programmes. Instead a line of cross-sector programmes has been created, with an emphasis on the creative industries.

GPEARI monitors applications made under specific culture-related regulations and deals with applications made by departments of the Ministry of Culture to the QREN; it compiles data on approved projects which have an impact on the cultural sector or are related to it, especially those put together by companies in the creative and cultural sector.

Portugal is one of the European countries whose cultural organisations are taking part in the Culture Programme 2007-2013.

Portugal is a member of the Community of Portuguese-Speaking Countries (*Comunidade de Países de Língua Portuguesa* – CPLP). Political, economic and cultural relations between member-states take place within this body (see chapter 3.4.1). An example of a cultural event organised by the CPLP is the "CPLP Cultural Week", which featured a schedule of events reflecting the diversity of lusophone culture.

In March 2007 Portugal ratified the Convention on the Protection and Promotion of the Diversity of Cultural Expressions and its Annex, adopted by the 33rd UNESCO General Conference in Paris in October 2005. The convention entered into force in Portugal on 16 June 2007 (Notice 180/2010, *Diário da República*, 1st Series – No. 155 – 11 August 2010).

Portugal approved the Convention on Safeguarding Intangible Cultural Heritage, adopted at the 32nd Session of the UNESCO General Conference in Paris on 17 October 2003, by parliamentary resolution 12/2008.

GPEARI represents the Ministry of Culture at UNESCO.

3.4.4 Direct professional co-operation

Arts and Heritage Institutions:

The WHPO – World Heritage of Portuguese Origin – network was established in October 2010. This is a worldwide cooperation network of countries which have Portuguese-influenced cultural heritage. 25 countries from four continents - Europe, Africa, Asia and South America - are members of WHPO. The project involves the University of Coimbra, the UNESCO National Committee, the Institute for the Management of Architectural and Archaeological Heritage (*Instituto de Gestão do Património Arquitectónico e Arqueológico* - IGESPAR) and ICOMOS Portugal (the Portuguese National Committee of the International Council on Monuments and Sites).

The Architecture Foundation, in collaboration with the Order of Architects and the British Council, is sponsoring an exchange programme between the UK and Portugal for 2010-2011. The best three emerging architects in the UK will join the corresponding group of three Portuguese architects to act as ambassadors for each country's architecture, taking part in programmes in Lisbon and London involving coordinated activities such as lectures and visits to studios and other locations.

Theatre. Dance. Film. Music:

Portugal is one of the four countries who are members of the IRIS network – the Southern European Association for Contemporary Creative Arts. The network covers theatre and festival directors in Portugal, France, Spain and Italy.

The Belém Cultural Centre (CCB) in Lisbon represents Portugal in the Prospero network, a plurennial cultural cooperation project, to which theatres in France, Belgium, Germany, Finland and Italy also belong. Cooperation takes the practical form of artists and cultural actors moving within the network and the dissemination of cultural productions.

PLATEIA, the Professional Association of Scenic Art Performers, is a member of IETM – International Network for the Contemporary Performing Arts.

The Portuguese representative for the *On the Move* initiative, an information network on cultural mobility, is responsible for information coordination.

3.4.5 Cross-border intercultural dialogue and co-operation

The High Commission for Immigration and Intercultural Dialogue (ACIDI), in addition to its own initiatives in the field of intercultural dialogue, is a member of the Roma EDEM project, whose aims are to reduce the disparity between anti-discrimination legislation and institutional practice, including issues relating to Gypsies and Travellers on the European political agenda. Coordination of this project is provided by the *Fundación Secretariado General Gitano* (see http://www.ciga-nos.pt).

On the issue of specific support for international youth mobility, the Portuguese Youth Institute (*Instituto Português da Juventude* - IPJ) is in charge of the Youth in Action programme in Portugal (*Juventude em Acção*). This is a European Union programme which encourages mobility among young people between the ages of 15 and 28 both within and outside European borders, informal education, intercultural dialogue and the inclusion of all young people, regardless of their educational, social or cultural origins.

3.4.6 Other relevant issues

MUS-E is an international project developed by the Portugal Menuhin Association, whose aims are artistic, educational and social. It has been in effect in Portugal since the 1996-1997 school year, and covers state schools in the first cycle of education. It seeks to promote respect and solidarity between peoples, through the practice of the creative arts, in the context of a generic arts education. Since 2006 it has been funded by the Choices Programme (*Programa Escolhas*), which is supervised by the Presidency of the Council of Ministers (Cabinet Office), and has become part of ACIDI (the national High Commission for Immigration and Intercultural Dialogue).

4. Current issues in cultural policy development and debate

4.1 Main cultural policy issues and priorities

Since the implementation of the Ministry of Culture (1995), some general cultural policy priorities have been sustained over the years, concentrating mainly in the protection of heritage, promotion of reading and development of national networks of activities and facilities. From 2009, strategic importance has also been attributed to issues such as language policy (in the context of the Portuguese Speaking Countries Community), creative and cultural industries and international promotion of Portuguese artists and cultural institutions.

On the other hand, cultural policy has been largely constrained by budget limitations, which were already taking place before the 2008 global financial crisis, but became much more evident since (see chapter 6 and chapter 4.2.1). Nevertheless, in the past three years some sectorial programmes have been launched which are worth mentioning. In 2009, the Classified Heritage Restoration Programme targeted a particular form of patronage involving major infrastructure construction companies in major monument restoration projects. In 2010 a Strategic Plan for State Museums was launched and new guide-lines were established (for more information see chapter 4.2.2). In 2011 the Fund for the International Promotion of Portuguese Culture was formed as a programme within the Ministry of Culture to support financially the international activities promoted by the Ministry. Although this fund, which gathers revenue from a specific lottery tax stipulation, has no formal connection with Camões Institute plans which are mentioned in chapter 4.2.1. It is expected to operate within the agreement established between the ministries of Foreign Affairs and Culture (see also chapter 3.4.2). At the same time, the *Portugal Music Export* agency was set up, with the Ministry of Culture and professional associations from the sector among its partners. Also in 2011, following the last two decades of public investment in performing arts infrastructures, a National Network of Theatres was announced, similar to those already existing for public libraries and museums.

4.2 Specific policy issues and recent debates

4.2.1 Conceptual issues of policies for the arts

The constraints on the public funding of culture, specifically the recurring reduced Ministry of Culture budget, became the central cultural policy issue (see chapter 6). This trend was already in motion before the 2008 global financial crisis and clearly has been even more apparent since then. As a predictable consequence, the Ministry's own activity was adjusted and contained through measures such as the merging or closing of some of its departments and the suspension or delay of specific programmes. The very existence of a Ministry of Culture and its replacement by a Secretary of State begun to be debated, meaning, at least as a symbolic measure, a regression to the mid-1990s as far as cultural policy is concerned. With the Nineteenth Government (June 2011) this replacement became effective.

Alongside the impact of financial constraints on cultural policy, some possible articulations with other public policies have come to the fore in recent years, namely the Economy and Foreign Affairs. The Ministry of Culture promoted a study on *The Cultural and Creative Sector in Portugal* which was presented in 2009 (drawing, at the national level, on important aspects from the 2006 KEA "The Economy of Culture in Europe" report for the European Commission). Although it has not resulted directly in new measures or pro-

grammes, it created a somewhat new public awareness for the economic importance of cultural activities (see chapter 4.2.3). As elsewhere, the ensuing debate was two-fold: some concerns were also voiced by cultural agents expressing some doubts about the meaning of "the creative sector" and concerns about the loss of specific perspectives on the core cultural and artistic sectors.

A joint strategy by the Foreign Affairs and Culture Ministries was advanced through a protocol signed in late 2010, which reinforced Camões Institute's attributions and competences regarding the international promotion of Portuguese culture. This protocol might prove to be of some importance in the near future given that, even though Camões Institute's administration is shared by both Ministries, it was not always possible to find a common orientation in the past. A major priority defined by this protocol is to expand the diffusion of information about Portuguese cultural productions and artists through the Camões Institute's cultural centres' global network.

4.2.2 Heritage issues and policies

Heritage policy is conducted by the Institute for the Management of Architectural and Archaeological Heritage (IGESPAR) and the Museums and Conservation Institute (IMC). With the new organic structure of the Ministry of Culture (see also chapter 1, chapter 3.1 and chapter 7.1 regarding PRACE), passed in 2006, both were reinforced in their attributes and competences.

Adding to its core and already established competences related to archaeological and historical cultural heritage, IGESPAR then acquired new competences regarding national classified monuments and buildings accreditation and administration formerly held by the Public Works Ministry.

Following that new institutional framework, different measures were put in place between 2008 and 2010, such as the *Heritage Risk Chart*, identifying restoration works needed in major national heritage sites and monuments. This chart was also instrumental in establishing the *Classified Heritage Restoration Programme*. With this programme, the Ministry of Culture received "in kind donations" – technical services – from infrastructure companies to be allocated to major heritage sites' restoration works, up to 1% of the amount of public works contracts established with those companies. Those donations were granted in return a cultural merit credit instrumental to obtain patronage fiscal benefits.

Following the same orientation, the *Cultural Heritage Safeguard Fund* was also launched in 2009, and heritage laws and regulations passed.

As for IMC, with its new organisational model, it became also responsible for conservation activities, alongside previously held competences, such as the inventory and policy-making regarding intangible cultural heritage, the management of several national palaces and the accreditation of RPM Museums.

Recently, technical and financial support for the improvement of management in museums and better training for museum staff has been given by the Portuguese Network of Museums (RPM created in 2000), working now in the IMC framework.

In 2010 a *Strategic Plan for State Museums* was launched and new guide-lines were established, including:

- new models for the management of IMC museums and palaces;
- direct collaboration with cultural agents, scientific institutions, public and authorities, foundations and other stakeholders;
- consolidation and sustained growth of the Portuguese Network of Museums;

- integration of the policy of preservation, study, communication and documentation of collections; and
- professional qualifications as well as academic and scientific formation of IMC human resources.

4.2.3 Cultural / creative industries: policies and programmes

Although there is no formal definition of cultural and creative industries in Portugal, the study on *The Cultural and Creative Sector in Portugal* commissioned by the Ministry of Culture (2009) brought a new public awareness to this subject. The method adopted drew, with some variations, on international studies such as the 2006 KEA's *The Economy of Culture in Europe* report for the European Commission and the 2008 UNCTAD's *Creative Economy Report*, among others, retaining a three-fold distinction between the core cultural activities, cultural industries and creative activities sectors. Referring to 2006 data, the report states that the cultural and creative sector in Portugal is equivalent to 2.8% of GNP added value and 2.6% of employment.

Creative Industries are growing in importance in Portugal, but still face many obstacles. The government's current programme mentions the intention to promote public credit lines in order to develop and organise training in the cultural and creative industries, namely fashion and design. It also plans to articulate policies to support and promote cultural and creative industries in the audiovisual sector, tourism and vocational training. However, those measures are not yet implemented.

Several initiatives were promoted by the Ministry of Culture specific to the Portuguese situation:

- evaluation on the "Development of a Creative Industries Cluster in the Northern Region" which aims to evaluate the impact of these activities in this region, to know their evolution and the role they play or may come to play in the economy and society;
- project IN Serralves Incubator of the Creative Industries aims to stimulate the development of companies or individuals pursuing creative and innovative activities with commercial potential (76 applications, 8 approved); and
- participation in the creation process of *ADDICT Agency for the development of Creative Industries –* a private association of 49 entities located in the northern region that aims to implement an appropriate governance model to support the increased capacity and creative entrepreneurship, business growth and attractiveness of creative places.

4.2.4 Cultural diversity and inclusion policies

The High Commission for Immigration and Ethnic Minorities (ACIME) was set up in 1996 (see chapter 5.1.1).

In recent decades, the number of foreigners living in Portugal has grown substantially: between 2000 and 2008, the number of foreigners holding legal resident permits in Portugal more than doubled, from 207 587 to 436 020, according to data from the Foreigners and Borders Service (SEF). The largest proportion of residence permits issued in 2005 – 46%, according to the SEF, was given to African citizens, in particular those from the countries having Portuguese as their official language (PALP), while, in recent years, there has been exponential growth in the numbers of East European immigrants (having on average higher educational attainment levels than others, but likewise working in less-skilled occupations) and those from Brazil.

Recent changes to the *Nationality Law (Organic Law 2/2006*, regulated by *Decree-Law 237-A/2006*) and the *Immigration Law (Law 23/2007)* have allowed for Portuguese nationality to be granted directly to the third generation and have simplified the legal require-

ments for the second generation, in addition to granting all legal immigrants uniform legal status and helping to combat traffic in human beings and illegal immigration. Following these measures, inter-ministerial strategies were approved, such as the *National Inclusiveness Action Plan*, which targets more than just immigrant and ethnic minorities, and the Immigrant Integration Project (*Council of Ministers Resolution 63-A/2007*). Family reunification, employment and occupational training, help with learning Portuguese in schools, and extending information networks and support mechanisms are some of the priority areas in these projects.

Several other programmes are currently in operation to integrate cultural minorities, mostly of gypsy origin – it is estimated that there are some 50 000 Portuguese gypsies - and immigrants, by working directly with these population groups; developing a network of support offices of various types; helping them to obtain training and find jobs; and also by deconstructing the prejudices and stereotypes associated with them; using the media; initiatives in schools; youth exchanges, etc.; and encouraging scientific research, supported or coordinated by the new *High Commission for Immigration and Intercultural Dialogue* – ACIDI – that replaced in 2007 the former ACIME (see also chapter 4.2.7).

4.2.5 Language issues and policies

Portuguese is the only official language in Portugal; it is spoken today by around 240 million people around the world.

Further expanding the use of the Portuguese language is a priority for Community of Portuguese-Speaking Countries (CPLP) and the Portuguese government. The International Portuguese Language Institute has been set up (2002) within the CPLP.

In November 2008, the government approved a *Strategy for Recognition and Promotion of the Portuguese Language* (*Council of Ministers Resolution n. 188/2008*) recognising the importance of the cultural, geo-strategic and economic value of the Portuguese language. It also recognises the fundamental role of the Portuguese Language in education and training in the scope of development cooperation. A special fund was allocated to this Strategy – *The Portuguese Language Fund*, with an initial allocation of EUR 30 million. An Interministerial Commission representing five ministries (Foreign Affairs; Education; Culture; Science, Technology and Higher Education; Parliamentary Affairs) was created to monitor the developments made and to approve projects in this area (see also chapter 3.4.6 and chapter 2.1).

4.2.6 Media pluralism and content diversity

Recent agreements and forms of association are taking place between the various actors in the field including film producers, television stations and distributors. The main goal of theses agreements is to ensure both diversity and viability of productions.

RTP, the state TV channel, offers public TV and radio channels for the international and African Portuguese-speaking community (RTP-I was set up in 1992). In addition, there are two general interest private terrestrial channels. The licence for the fifth terrestrial channel is now in legal dispute. The new Digital Terrestrial System (to which existing channels will migrate) is due to be fully implemented in 2012.

The *Television Law* (*Law* 27/2007) stipulates that at least 50% of the air time must be allocated to broadcast Portuguese language programmes and at least 20% for creative works in Portuguese – in both cases, non-Portuguese lusophone productions must not exceed 25% of air time. Thereafter, preference should be given to European productions, with at least 10% allocated to recent productions (of less than 5 years old) by independent European producers. Broadcasters are required to submit, to the Regulatory Authority (*ERC* - *En*-

tidade Reguladora da Comunicação Social), all the information required to monitor compliance with these obligations.

The Radio Law (Law 4/2001, as amended by Law 7/2006) commits broadcasters to an annual minimum quota for the dissemination of Portuguese music. This minimum quota varies annually from 25 and 40% of musical programming on each channel. However, it is stipulated that at least 60% of that quota must be fulfilled with music composed / sung in the Portuguese Language by citizens of the EU; and at least 35% of the same quota must be fulfilled with music produced in the last 12 months. The Regulatory Authority (ERC - Entidade Reguladora da Comunicação Social) is responsible for monitoring and controlling this law enforcement.

4.2.7 Intercultural dialogue: actors, strategies, programmes

Some government bodies are strengthening their efforts to better respond to the needs of the immigrant population, e.g. the new High Commission for Immigration and Intercultural Dialogue (ACIDI), a public institute under the Presidency of the Council of Ministers (in 2007, ACIDI replaced the High Commission for Immigration and Ethnic Minorities – ACIME –, which was established in 1996).

The High Commission main attribution consists in the promotion of intercultural dialogue. Important axis designed to address this aim: to implement the study of ethnic minorities integration in order to inform operative government policies; to include in the High Commission social bodies, delegates chosen by the associations or federations of the different immigrants communities; to promote interdepartmental action across the public administration system, central and local (see the attached cases of Good Practice on Intercultural Dialogue).

Programmes for the use of audiovisual, particularly TV weekly magazines, are broadcasted by a national TV channel to facilitate intercultural dialogue. They are co-produced mainly by the High Commission and some associations that work for equality and against racial discrimination.

In the context of bilateral cultural agreements signed between Portugal and other countries in order to establish cultural cooperation programmes, Portugal carries out the so-called "Mixed Commissions". In recent years (1996/2003), these Commissions have been conducted with 15 European Countries.

ACIDI was the Portuguese body responsible for preparing the European Year of Intercultural Dialogue 2008.

4.2.8 Social cohesion and cultural policies

Social cohesion is not a specific issue of cultural policies in Portugal. The National Plan for Growth and Employment outlines the priorities for the next years but cultural policies are usually out of the agendas for qualification, employment and social cohesion.

4.2.9 Employment policies for the cultural sector

Table 1 provides some material for the analysis of employment in the arts in different sectors and by gender. While a complete breakdown is not currently available, progress has indeed been made to track the number of people working in various artistic professions. The Table below does not include independent or freelance professionals, which explain the lower than expected number shown for those working in music or in visual and performing arts.

Table 1: Share of professionals working in different art sectors, in %, 2004

Cultural domains	G	Total	
Cultural domains	Male	Female	1 Otai
Visual arts	9.9	5.1	7.6
Music	7.8	3.5	5.8
Performing arts	4.9	5.5	5.2
Dance	1.2	3.8	2.4
Theatre	3.7	1.7	2.7
Audiovisual	53.1	20.1	37.5
Cinema	13.9	5.5	9.9
Television	14.1	6.0	10.3
Radio	4.0	1.7	2.9
Cinema + television + Radio	21.1	6.9	14.4
Literature	7.7	7.9	7.8
Books	5.8	4.5	5.2
Libraries	1.9	3.4	2.6
Preservation	9.5	16.3	12.7
Cultural heritage	2.4	1.8	2.1
Museums and archives	7.0	14.6	10.6
Socio-cultural activities	7.2	41.5	23.4
Total	100.0	100.0	100.0

Source: Ministry of Labour and Social Solidarity, Quadros de Pessoal, 2004.

The last and current government's programme for the culture sector include the intention to review the legal status of cultural professionals, the definition of a new welfare and pension system and the taxation of work tools, providing safeguards in particular for the independent nature of artistic work. In this context, Law 4/2008 represents an important step forward establishing the juridical regime for employment contracts of performing arts professionals, having in attention labour specificities of the sector and focusing permanent work contracts. However, key aspects such as professional qualifications and pension and welfare arrangements were postponed for future regulation. Some of those issues were addressed in a recently approved amendment (Law 28/2011), such as extending the juridical regime to professionals other than artists (technicians and mediators), allowing for simultaneous contracts with different employers and generally reinforcing the legal obligation of a formal contract or the presumption of contractual obligations when there is an informal professional relationship.

4.2.10 Gender equality and cultural policies

The Third National Plan for Citizenship and Gender Equality was launched in 2007 and will run until 2010. The Commission for Citizenship and Gender Equality coordinates the implementation of this Plan in articulation with several government sectors. Regarding the culture sector, a working group formed by several members of MC bodies was created under the leadership of GPEARI.

In the cultural sector, the following objectives were outlined for 2008:

- to ensure that equilibrium is maintained in awarding scholarships and grants, favouring the under-represented gender;
- to ensure that criteria for awarding prizes in the cultural arena reflect a balance between
- to include the gender perspective in training cultural agents;
- to use the state TV channel to promote the visibility of women's contributions in various areas of life, in particular Culture, History, Economics, Science and Politics;

- to generate awareness of the need for equitable representation of men and women in public collections; and
- to give added value to written work and creative and cultural production which respects the human rights of men and women.

4.2.11 New technologies and digitalisation in the arts and culture

Several projects have now been concluded in cultural sphere:

- A web-site promoted by the Ministry of Culture for developing a network for cultural facilities and activities, as well as providing a broader base of support for production and access to Portuguese art and literature in multimedia formats (http://www.culturaonline.pt).
- The Knowledge Network in Public Libraries that includes widespread free broadband access to the Internet in public libraries, as well as a web portal with access to all the resources, technical information and catalogues of those libraries (http://rcbp.dglb.pt);
- *Virtual Office* the on-line platform of *Arts Territory Programme* (see chapter 7.3) with information about the structures (artistic entities and local authorities as cultural promoters), the artistic productions and the cultural venues registered / participants. This platform enables the programme management as well as the schedule of the actions (http://www.territorioartes.pt/);
- National Digital Library internet interface providing public access to online digitalisation service using information indicated in the catalogue of the National Library (BNP) for the digitalisation of specific items from its collections (material already in the public domain);
- MATRIZNET an internet interface providing public access to *Matriz Inventory and Collections Management* of National Museums and Palaces. This resource was conceived in order to enable the computerisation of museum inventories, the digitisation of museum collections, as well as the management of the circulation of museum pieces (http://www.matriznet.imc-ip.pt).
- Creation of a Digital Cinema Network (*Rede Cine*): connecting screen cinemas to a central system which supplies digital copies of the films to be shown. This makes it possible to bring cinema to culturally less well-endowed environments and enables any theatre to connect to the system.; and
- Development of IGESPAR Information System based on the integration of information of former institutes (IPPAR and IPA). This includes new technological features and production of content regarding monuments and archaeological sites.

In recent years, indicators regarding PC ownership and Internet connections have seen an impressive growth, reaching 56% and 48% in 2009 (Table 2). In four years broadband internet access grew from 20% to 46% (2009).

Table 2: Computer ownership, internet connection and broadband internet access by household, in %, 2000-2009

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Computer ownership	22	24	27	38	41	43	45	48	50	56
Internet con- nection	9	13	15	22	26	32	35	40	46	48
Broadband internet access				8	12	20	24	30	39	46

Source: INE, Inquérito à Utilização de Tecnologias da Informação e da Comunicação nas Famílias.

4.3 Other relevant issues and debates

Information is currently not available.

5. Main legal provisions in the cultural field

5.1 General legislation

5.1.1 Constitution

Under Article 2, cultural democracy is mentioned:

"The Portuguese Republic is a democratic State based on the rule of law, the sovereignty of the people, plurality of both democratic expression and democratic political organisation, as well as respect for and the safeguarding of fundamental rights and freedoms; its aim is to achieve economic, social, and cultural democracy and to push participatory democracy further."

The Portuguese Constitution has a whole chapter on cultural rights and duties (*Article 73-79*). Some excerpts:

"In conjunction with the mass media, cultural associations and foundations, cultural and recreational groups, associations for the protection of the cultural heritage, organisations of residents and other cultural agencies, the State shall promote the democratisation of culture by encouraging and guaranteeing access by all citizens to the fruits of culture and cultural creativity" (*Article 73 point 3*).

With regard to cultural enjoyment and creativity, the Portuguese Constitution states (*Article 78*):

- 1. Everyone has the right to cultural enjoyment and creativity, and the duty to preserve, protect and extend the cultural heritage.
- 2. It is the duty of the state, in co-operation with all cultural agencies:
 - a) to encourage and ensure access for all citizens to the means and mechanisms of cultural activity, and to correct present imbalances in this respect;
 - b) to support initiatives to stimulate the broad variety and expression of individual and collective creativity, and a wider availability of cultural works and assets of quality;
 - c) to promote the protection and increased respect for the cultural heritage, making it a vital element of the common cultural identity;
 - d) to develop cultural relations with all peoples, particularly those that are Portuguese-speaking, and ensure the protection and promotion of Portuguese culture abroad; and
 - e) to co-ordinate the policies for culture with other state policies.

Article 70 mentions the cultural rights of young people:

Section 1: "Young people, especially young people at work, receive special protection for the purpose of effective enjoyment of their economic, social, and cultural rights..."

The only "cultural duty" mentioned is the duty to preserve cultural heritage - *Article 78*, section 1: "Everyone has the right to cultural enjoyment and creation, and the duty to preserve, defend, and increase the cultural heritage."

5.1.2 Division of jurisdiction

Law 159/99, of 14 September 1999 defines the framework for the transfer of responsibilities to local government, as well as setting the limits for central and local government intervention, thus establishing the principles of administrative decentralisation and local government autonomy. For the sector called "Heritage, culture and science" (Article 20), this legislation states that:

- "1 Municipal authorities are responsible for planning, managing and carrying out public investment in the following areas:
- a) Culture centres, science centres, libraries, museums and municipal theatres;
- b) Cultural, landscape and urban heritage in their district.
- 2 Municipal authorities are also responsible for:
- a) Making recommendations for listing or conservation orders for sites or sets of buildings, in accordance with the legal requirements;
- b) Listing and issuing conservation orders for sets of buildings or sites which are deemed to be of municipal interest, and ensuring they are properly restored and maintained;
- c) To take part, by means of agreements with public, private or co-operative organisations, in the conservation and restoration of heritage and listed buildings;
- d) To organise and keep up to date an inventory of cultural, urban and landscape heritage within their district:
- e) To manage museums and listed buildings and sites, in accordance with legal regulations to be defined;
- f) To provide support to non-professional cultural projects and actors;
- g) To provide support for cultural activities which are of interest to the municipality;
- h) To provide support for building and conservation of local cultural facilities."

5.1.3 Allocation of public funds

The legislation which addresses and defines how the ministry and cultural and arts activities are funded is to be found in two types of legal instrument:

- those which define the organisation of the bodies responsible for drafting and applying sectoral policies; and
- those which provide specific rules on how support to the arts is to be implemented.

The two types of legal instrument are outlined in greater detail in chapter 5.3.

5.1.4 Social security framework

Some legislation has been introduced since the 1980s to safeguard the position of artists and performers in terms of social security. The debate continues, however, as artists and cultural professionals continue to campaign for the government to set up a specific system of social welfare for them:

- inclusion of artists in the General Social Security Scheme (*Decree-Law 407/82*);
- special support scheme for artists / writers having difficulty earning a living (*Decree-Law 415/82* and *Despatch 23605/2006* (Second Series));
- occupational retraining grant for artists or performers (*Regulation-Despatch 79/83*); and
- special early old-age pension scheme for classical and modern dancers (*Decree-Law* 482/99).

Artists who are independent (self-employed) professionals – as most are in the arts sector – are covered by the social security scheme for self-employed workers in the event of illness (only if they are covered by the comprehensive scheme, which requires higher monthly contributions), workplace accident and occupational illness, maternity, paternity and adoption, incapacity, old age and death, as well as maternity grants and retraining grants.

5.1.5 Tax laws

The regulation of fiscal policies and tax laws in the cultural domain is the responsibility of the Ministry of Finance.

The Arts Patronage Act was introduced in 1986 and was followed by new laws, particularly the 1999 Statute of Patronage (Law 74/99), which regulates the different types of patronage and sponsorship, enlarges the area to include patronage of education, environment, sport, science and technologies, and increases the tax incentives available (the highest level is for long term contracts). Changes introduced in 2007 limited fiscal benefits to the public and non-profit sectors (Law 52A/2006).

A number of cultural actors have expressed the opinion that the *Arts Patronage Law* is too complex and therefore of limited practical use. They argue that it should be revised and made more flexible.

Performing artists are exempt from VAT (Chapter II, Section I, Article 9, paragraph 16b of the *VAT Regulation Code*).

Benefits associated with income from intellectual property: income from ownership rights in literary, artistic or scientific work, including income from the sale of unique works of art and income from educational and scientific works, when earned by authors resident in Portugal, provided that they are the original owner, are assessed for personal tax purposes at only 50% of their value, net of other benefits. These provisions exclude income from works not of a literary, artistic or creative nature, works of architecture and advertising work (*Items 1 and 2 of Article 56* of the *Tax Exemption Act*).

5.1.6 Labour laws

For performing arts professionals, Law 4/2008 establishes the legal framework for employment contracts. There are however some unresolved gaps in this law: in addition to the fact that it only applies to sector workers under contract (a very small proportion of the total number of performing and visual arts professionals, who are mostly self-employed), rules relating to professional certification and social security were left undefined (see chapter 4.2.9).

Other relevant legal documents:

- regulations governing specific careers in the functional areas of:
 - Libraries, Documentation and Archiving (*Decree-Law 247/91*, as amended by *Decree-Law 276/95*);
 - Museums (*Decree-Law 55/2001*);
 - Archaeology (*Regulatory Decree 28/97*);
- specific legislation regarding School Libraries Network (RBE) regulating the function of Librarian-Teachers (*Order n°* 756/2009);
- establishment of the Culture employment and Culture Training (*Joint Despatches 243/99 and 244/99*); and
- general changes were introduced as part of a new statute for public service careers set in 2008 (*Decree-Law 121/2008*).

5.1.7 Copyright provisions

• Copyright and Related Rights Code (Decree-Law 63/85, as amended by Law 16/2008); regulations regarding copyright duration (Decree-Law 334/97); regulations governing compensation for reproducing or recording (Law 62/98) – transposing European directives;

- Regulations governing Rental and Lending Rights, and certain rights relating to copyright that exempt public libraries, schools, universities, museums, public archives, public foundations and non-profit organisations from the payment of remuneration for public lending (Decree-Law 332/97); and
- Regulations governing resale rights for original works of art (Law 24/2006). Transposes into national law European Parliament and Council Directive 2001/84/CE, of 27 September 2001 (the Resale Rights directive), on the right of resale for the benefit of the author of a work of art, subsequent to the first transfer of the work by that author.

A governmental office for author's rights was established in 1997 (*Decree-Law 57/97*) to provide information to the public and official support for new legislative initiatives by the government in copyright matters. With PRACE restructuring, this office is now integrated in GPEARI – at the Ministry of Culture.

There are also private institutions for the management of copyright and related rights in terms of the national legislation: the Portuguese Authors Society (SPA, founded in 1925), the Management of Artists and Performers Rights (GDA, founded in 1995) and the Association for the Management of Private Copies (AGECOP, founded in 1998).

5.1.8 Data protection laws

Personal Data Protection Law (Law 67/98) – transposing European directives.

5.1.9 Language laws

The *Portuguese Constitution* establishes Portuguese as the official language (*Article 11*). In 1999, *Mirandês* also became an official language (*Law 7/99*, regulated by *Despatch Order 35/99*).

In order to acquire Portuguese nationality, applicants must take a Portuguese language test (*Order 1403-A/2006*).

For legislation concerning the use of the Portuguese language in TV and Radio broadcastings see chapter 4.2.6.

The Portuguese Spelling Agreement was signed by the CPLP's members in December 1990. Its objectives were to encourage the use of the Portuguese language internationally and implement a common set of rules in the signing countries. In Portugal, the Agreement was first approved in the following year (*Presidential Decree 43/1991*) but, having met considerable opposition by some cultural sectors, a modifying protocol was approved in 2008 (*Presidential Decree 52/2008*). The Agreement was finally implemented in 2009.

5.1.10 Other areas of general legislation

Information is currently not available.

5.2 Legislation on culture

See chapter 5.3.

5.3 Sector specific legislation

5.3.1 Visual and applied arts

Rules for the state funding of the arts through the Ministry of Culture (Directorate-General for the Arts):

These rules were approved under *Decree-Law 225/2006*, of 13 November 2006, which defines its objectives as the consolidation and sustainability of a network of technically and professionally qualified independent cultural actors, allocated in a balanced way across the country's various different regions. The legislation defines the ways in which the ministry should intervene, with a view to tying its measures in with other sectoral policies.

This *Decree-Law* was amended by *Decree-Law 196/2008* of 6 October, which introduced support for creative activities and cultural programming, or a mixture of both, which seek to compensate for weaknesses in terms of publication, artistic training, internationalisation and facilities.

Rules governing direct and indirect support for the arts as provided for in *Decree-Law* 225/2006, of 13 November 2006:

Government Order 1204-A/2008, of 17 October 2008, approved the regulations for direct and indirect support to the arts provided for in *Decree-Law 225/2006*, of 13 November 2006. It was amended by *Government Order 1189-A/2010* of 17 November 2010, with the aim of specifying its objectives more precisely and clarifying the underlying concepts.

5.3.2 Performing arts and music

The legislation mentioned in chapter 5.3.1 also applies to the arts sector, including performing and visual arts.

5.3.3 Cultural heritage

- the *Portuguese Heritage Protection Law (Law 107/2001)* establishes the basis for the policy and cultural heritage protection and improvement regime; and
- the *Framework Law on Portuguese Museums* (*Law 47/2004*) defines principles of national policies for museums. This legal document establishes guidelines for recognition of Museums and Visiting collections. It also officially establishes and develops the Portuguese Network of Museums (RPM) a former project structure launched in 2000.

5.3.4 Literature and libraries

The most significant legislation produced in the field of books concerns networking of municipal public libraries (RNBP) and school libraries (RBE), which is in line with the principles of decentralisation and cultural participation.

The RNBP was initiated in 1987 (*Decree-Law 111/87*) to construct and develop municipal libraries according to principles outlined in the Manifesto of UNESCO. The programme is based on the creation of partnerships between central and local administrations, which assist in modernising the public libraries.

The recent *Law 22/2010* dated 22 August 2010 exempts from Value Added Tax those transfers of books which are made free of charge for subsequent distribution to the disadvantaged, to private charitable institutions and to non-profit-making non-governmental organisations, as well as transfers of books free of charge to the government department responsible for culture, educational and cultural institutions, centres for the educational rehabilitation of offenders, and prisons.

5.3.5 Architecture and spatial planning

See chapter 5.3.3.

5.3.6 Film, video and photography

In 2004, after a long period of public discussion, the *Law on Audiovisual and Cinemato-graphic Art* (*Law 42/2004* and *Law 227/2006*) was approved by the parliament. A new law has been the object of public debate, but has not yet been presented.

In 2007 the Investment Fund for Cinema and Audiovisual (FICA) was created (*Order n.* 277/2007). Among its various objectives, the Investment Fund aims to contribute to the integrated development of the audiovisual sector, giving preference to interventions oriented towards raising the sustainability of cinematographic and audiovisual activities, boosting the creative and competitive capacity of small and medium enterprises (SME) and increasing the penetration of works produced or co-produced by these SMEs into international markets, thereby increasing the added value of the sector and increased business opportunities. This Law extends the range of measures which support the cinema and audiovisual sectors by creating an investment fund that is co-financed by film and television distributors and operators, in particular cable TV operators. As with the new law project, alterations to the investment fund have been discussed (namely further extending funding sources to digital platform partners), but have not yet came into place.

5.3.7 Mass media

The *Television Law (Law 27/2007)* stipulates that at least 50% of air time must be allocated to broadcasting Portuguese language programmes and at least 20% must be allocated to broadcasting creative works in Portuguese (see chapter 4.2.6).

In 1981 the first legal instrument establishing quotas concerning the radio diffusion of Portuguese music (*Law 12/81*) was approved by the parliament. The *Radio Law (Law 4/2001*, as amended by *Law 7/2006*) commits broadcasters to an annual minimum quota for the dissemination of Portuguese music (see chapter 4.2.6).

The company holding the state radio and TV concession was reorganised in 2007 (*Law* 8/2007).

5.3.8 Other areas of culture specific legislation

Information is currently not available.

6. Financing of culture

6.1 Short overview

The main indicator for public funding of culture is the relevant section of the Government's General Budget. As Table 3 shows, the percentage of the budget allocated to the Ministry of Culture averaged 0.5% over a period of thirteen years, although in 2009 that percentage was only 0.3% – the lowest relative value in that period.

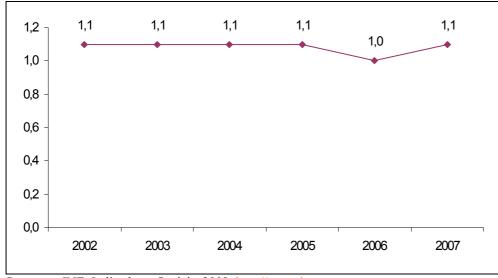
 Table 3:
 Culture provision in the state budget, in % and million EUR, 1998-2011

Year	Percentage	Value
1998	0.6	198.1
1999	0.6	210.2
2000	0.6	249.1
2001*	0.6	293.8
2002*	0.7	293.5
2003	0.5	255.2
2004	0.5	273.4
2005	0.6	285.1
2006	0.5	260.5
2007	0.4	242.6
2008	0.4	246.5
2009**	0.3	212.7
2010	0.4	236.3
2011	0.4	201.3

Sources: Ministry of Finances / DGO, State Budget Report.

Expenditure on culture by public authorities for the last 5 years available (Figure 1) demonstrated a constant trend (around 1.1% of GDP), with an exception in the year 2006 (1.0%).

Figure 1: Expenditure by public authorities on culture, in% of GDP, 2002-2007



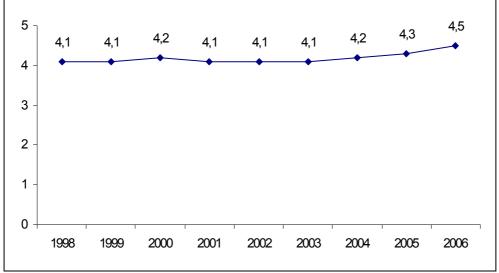
Source: INE, Indicadores Sociais, 2009. http://www.ine.pt

^{*} does not include the media.

^{**} does not include State Corporate Sector.

An examination of the total expenditure on culture by Portuguese families shows no significant changes at around 4% of GDP until 2003. However, since then, an upward trend can be noticed (Figure 2).

Figure 2: Expenditure on culture by Portuguese families, in % of GDP, 1998-2006



Source: INE, Indicadores Sociais 2009. http://www.ine.pt.

6.2 Public cultural expenditure

6.2.1 Aggregated indicators

Public culture spending per capita by central government in 2009 was 23.5 EUR. Public culture spending per capita by local government in 2009 was 61.1 EUR. See also chapter 6.1 and chapter 6.2.2.

6.2.2 Public cultural expenditure broken down by level of government

Local government expenditure on culture surpassed central administrations by the mid-1990s. Since then this trend has became more apparent and the gap between both levels of government widened.

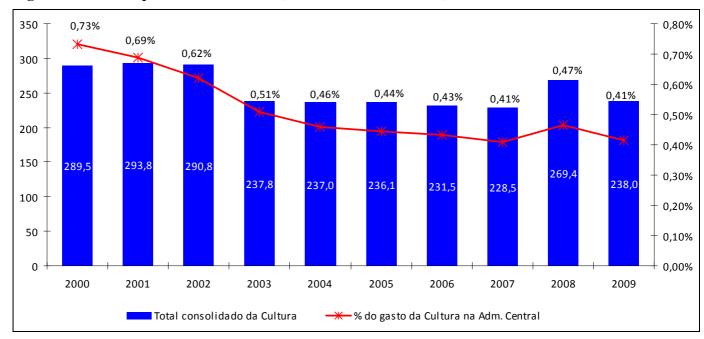
Table 4: Public cultural expenditure: by level of government, in million EUR, 2009

Level of government	Total expenditure	% of total
State (federal)	238.0	27%
Regional (provincial, Länder)		
Local (municipal)	649.7	73%
Total	887.7	100.0%

Source: OAC from INE, *Estatisticas da Cultura, Desporto e Recreio* [for Local (Municipal)] and Ministry of Finances / DGO, *Conta Geral do Estado* [for State (federal)].

Note: i) Expenditure figures regarding autonomous regions of the Azores and Madeira are not available. ii) Total Expenditure of the State (federal) only refers to continental territory. iii) Public cultural expenditure by sector is only available with separated figures for each level (state and local authority). iv) Percentages only indicate the approximate values.

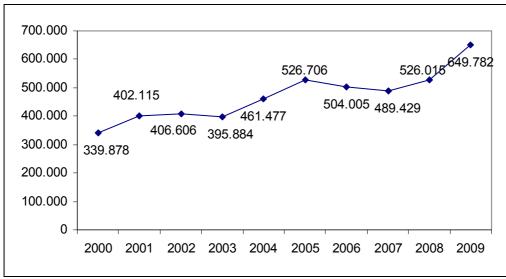
Figure 3: State expenditure on culture, in million EUR and %, 2000-2009



Source: OAC from MFAP / DGO, CGE.

As Figure 4 shows, there was, however, a slight drop in local authority expenditure on culture for the year 2006, as well as an increase in 2005, 2008 and 2009.

Figure 4: Local government spending on culture, in thousand EUR, 2000-2009



Source: OAC from INE, Estatísticas da Cultura, Desporto e Recreio (http://www.ine.pt).

6.2.3 Sector breakdown

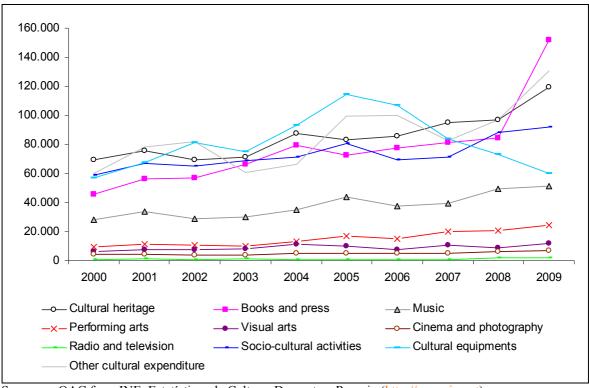
Table 5: Direct state cultural expenditure by sector, in million EUR, 2008-2009*

Domain	Direct expenditure (Ministry of Culture budget)				
	2005	2006	2007	2008	2009
Cultural Heritage	109.4	92.7	86.2	83.1	82.2
Archives and Libraries	35.0	32.2	28.3	29.7	29.4
Visual and Performing Arts	79.9	86.5	83.8	86.8	47.4
Cinema, Audiovisual and Multimedia	25.2	22.3	21.6	20.1	20.6
Socio-cultural Activities	35.6	26.8	22.7	26.8	33.1
TOTAL	285.1	260.5	242.6	246.5	212.7

Source(s): Ministry of Culture / Secretaria Geral.

Figure 5 illustrates the evolution of local authority expenditure by cultural sub domain. Over this period, expenditures increased in all cultural domains (despite since 2005 the downward trend in the expenditure on Cultural Equipment), especially those related with Cultural heritage and Books and Press.

Figure 5: Local authority expenditure by cultural sub domain, in thousand EUR, 2000-2008



Source: OAC from INE, Estatísticas da Cultura, Desporto e Recreio (http://www.ine.pt).

6.3 Trends and indicators for private cultural financing

Information is currently not available.

^{*} See also chapter 3.1.

7. Public institutions in cultural infrastructure

7.1 Cultural infrastructure: tendencies & strategies

The process of privatisation in Portugal can be seen particularly through: the successive laws on patronage and sponsorship; the Act establishing private radio and television stations; the Act creating state-sponsored foundations.

State corporations have been set up as a result of implementation of the *Programme to Reorganise the Central Government Administration* (PRACE, see chapter 1) and the consequent changes in the Ministry of Culture's organisation chart. Of particular note is the merger of the artistic structures – S. Carlos National Theatre, the National Ballet Company – which produced OPART, a state enterprise entity. The Ministry of Culture presented in 2010 a further merger of the two remaining national theatres (D. Maria II National Theatre and the S. João National Theatre) – with OPART, but those plans were suspended.

7.2 Basic data about selected public institutions in the cultural sector

Table 6: Cultural institutions financed by public authorities, by domain

Domain	Cultural institutions (subdomains)	Number (2009)
Cultural heritage	Cultural heritage Cultural heritage sites (recognised)	
	Museums (organisations)	28
	Archives (of public authorities)	2
Visual arts	public art galleries / exhibition halls	-
	Art academies (or universities)	-
Performing arts	Symphonic orchestras	3
	Music schools	-
	Music / theatre academies (or universities)	-
	Dramatic theatre	2
	Music theatres, opera houses	1
	Dance and ballet companies	1
Books and Libraries	Libraries	188
Audiovisual	Broadcasting organisations	1*
Interdisciplinary	Socio-cultural centres / cultural houses	-
Other (please explain)		-

Source(s): Institute for the Management of Architectural and Archaeological Heritage (IGESPAR) and UNESCO; Institute for Museums and Conservation (IMC); Directorate-General for Books and Libraries (DGLB); Portuguese Radio and Television (RTP).

7.3 Status and partnerships of public cultural institutions

The process of co-operation between the public and private sectors can also be seen in the creation of foundations.

The 1986 legislation states that gifts made to foundations automatically reduce the amount due on taxable income, provided that the state, the Autonomous Regions or local authorities contribute at least 50% of the initial funding.

Foundations are, supposedly, institutions which best exemplify commitment on the part of the civil society (there are over 450 foundations in Portugal). Foundations are established

^{*} RTP, Portuguese Radio and Television (Television – 9 channels; Radio – 8 channels).

with significant private capital, but in fact they also receive support from the state, which agrees to cover a set proportion of the fixed running costs. A number of foundations were created along these lines between 1989 and 2006: the Serralves Foundation, the Arpad Szènes-Vieira da Silva Foundation, the Centro Cultural de Belém Foundation, the Museu do Douro Foundation, the Contemporary and Modern Art Foundation – Berardo Collection.

The geographical distribution of cultural foundations does not change the conventional shape of the cultural map of the country: there is a heavy concentration of foundations in Lisbon, followed by Oporto. The foundations set up in the Northern interior of the country do represent local attempts to decentralise culture. Decentralisation is in fact one of the main aims of the foundations located in the Northern region; in the Lisbon region, on the other hand, internationalisation is a key feature.

The Gulbenkian Foundation, which celebrated its 50th anniversary in 2006, continues its important cultural role in Portugal. In recent years, Gulbenkian undertook a major restructuring of its structure and re-directed its activities. The most controversial measure is the closure of the Gulbenkian Ballet – a major artistic reference of contemporary dance in Portugal that was founded in 1965. On its 50th anniversary, Gulbenkian entered a new phase, re-directing support to different cultural areas and offering new programmes (e.g. The Cultural Forum "The State of the World" and the educational programme Descobrir).

8. Promoting creativity and participation

8.1 Support to artists and other creative workers

8.1.1 Overview of strategies, programmes and direct or indirect forms of support

Norms and rules have also been published for aid to theatre and dance activities. In 2003 a new system of financial supports for professional activities in the domains of Performing Arts and Contemporary Art was established. However, the support for certain areas (namely the theatre) has met with growing demands and the need of a more precise definition of funding criteria.

In 2007, the Ministry of Culture set up, through the Directorate-General of Arts and the Science Programme "Ciência Viva", a common research and work platform for artists and scientists, thus implementing the Residencies Network Programme: Art / Science Experimentation. This programme involves holding artistic residencies at various scientific host institutions. The objective is to enable artists and scientists to explore artistic and aesthetic fields using the tools from both domains. In the first edition of this programme (2007) 33 projects were submitted, of which 8 were selected. In 2009 a second edition of this programme was launched again.

The Inov-Art programme, organised by the Ministry of Culture's Directorate-General for the Arts, should also be mentioned. Its aims are to provide 200 training internships annually in established international institutions, for those aged between 18 and 35 who have recognised qualifications or skills in the cultural or artistic field. The programme was implemented for the first time in 2009.

8.1.2 Special artists' funds

Purchasing programmes concerning works in the sector of visual arts took place through the action of the Directorate-General for Arts (DGArtes) that also is responsible for annual financial support to performing arts structures.

Anyway, support for visual arts and music is derived partly from the private sector, especially after the revised *Sponsorship Act*, and from foundations (there are approximately 350 Foundations in Portugal, over half of them are cultural foundations subsidised by the state – see chapter 7).

8.1.3 Grants, awards, scholarship

Outside the usual grant systems for artists from different professional fields, special grants for literary creation have been operating since 1996. There is also support for young creators through exhibitions and prizes derived from the Ministry of Culture, local administrations and private bodies.

Significant sources of support from state bodies are as follows:

- support from the DGLB for writers to travel to fairs and festivals abroad;
- support from the National Fine Arts Academy for artists to travel abroad:
- awards in the visual arts (in illustration and photography) and cinematography, by the ICA and the CPF;
- annual awards from the National Fine Arts Academy in architecture, sculpture and painting; and
- scholarships for the creative arts, particularly in the fields of visual arts, literature and music.

The third sector, in particular foundations, plays a prominent role in awarding scholarships and prizes - the Calouste Gulbenkian Foundation, for example, which awards scholarships in various fields. In the arts field, there are scholarships for specialised study and professional development abroad; the dance support programme; and development scholarships in music.

This foundation is also important for its grants and awards for creative projects in the visual arts; for its support to new theatrical producers; for theatrical research. It also has awards for restoring and improving heritage sites (Vasco Vilalva prize); for emerging young writers of children's and young people's literature (Branquinho da Fonseca prize), among many others

Another foundation with a key-role in providing scholarships in the artistic and cultural field is the Luso-American Development Foundation (FLAD). Of particular note is the funding provided for short-term secondments abroad in the fields of language, literature, music and musicology.

8.1.4 Support to professional artists associations or unions

Professional qualifications and welfare arrangements for artists and other cultural professionals are the most recent issues that mobilise professional artists' associations (see chapter 4.2.9).

Other issues could be mentioned, such as The Portuguese Association of Librarians, Archivists and Document Professionals (APBAD) which promoted several actions in defence of public lending in Portuguese libraries. This professional association argues that the European directive on the mandatory payment of dues on the loan of works in public libraries would undermine the vitality of public libraries in Portugal, which are struggling with severe economic constraints in order to fulfil their social function. In this context, APBAD promoted several awareness actions, including an online petition addressed to the Portuguese government and the European Commission in defence of public lending in Portuguese libraries.

8.2 Cultural consumption and participation

8.2.1 Trends and figures

Table 7 gives an idea of the overall trends in public participation in cultural activities between 1990 and 2009. There is evidence of a general upward trend in participation (except for a decrease in cinema for the last years).

Attendance numbers at cultural venues and events have increased significantly over the last decades. There has been a sharp increase in attendance at live events due to a matching increase in the number of new or improved cultural venues. Although the lack of data regarding libraries it is possible to note an increase in the numbers of those that use libraries. This is undoubtedly due to the dynamism generated by the National Public Library Network (RNBP) and the Readership Promotion Programme (integrated with the National Reading Plan in 2007).

Mention should also be made of the theatre where, despite low numbers in absolute terms, there has also been very marked growth during the period 1990-2009.

Table 7: Participation, absolute numbers, in thousands, 1990–2009

Year	Cinema	Theatre	Museums	Libraries	Live shows (except theatre)	Exhibitions
1990	9 593	327	6 317	2 037	680	-
1991	8 234	302	6 578	1 769	666	-
1992	7 848	361	6 596	2 120	839	-
1993	7 786	192	7 202	2 098	767	-
1994	7 135	411	8 292	3 507	979	2 781
1995	7 397	339	8 667	4 101	616	2 397
1996	10 446	281	8 395	4 369	655	2 028
1997	13 708	232	8 286	5 885	929	2 462
1998	14 837	229	8 645	6 368	817	3 900
1999	17 026	407	-	9 262	909	3 364
2000	17 915	614	7 368	9 992	2 296	3 787
2001	19 469	970	8 556	12 096	2 865	4 196
2002	19 480	1 267	9 163	11 893	2 997	5 527
2003	18 723	1 281	8 922	12 794	3 356	4 918
2004	18 800	1 706	8 980	-	5 268	4 958
2005	17 165	1 746	9 725	-	7 292	5 022
2006	16 367	1 556	10 315	-	7 248	5 544
2007	16 318	1 762	9 971	-	8 042	6 890
2008	15 979	1 850	11 648	-	9 254	8 049
2009	15 705	1 816	12 932	-	8 322	8 625

Source: INE - Estatísticas da Cultura, Desporto e Recreio, 1990/2007; INE, Estatísticas da Cultura,

2008/9. (http://www.ine.pt).

Note: Survey on libraries suspended by INE since 2004.

8.2.2 Policies and programmes

At present, reaching new audiences is an increasing priority of cultural policy. In Portugal, efforts have been made to encourage participation by increasing the number of touring projects, launching of new programmes for amateur and university theatre, promoting cultural activities addressed to young people, launching of a National Reading Promotion Programme (1997) and a National Reading Plan (2006). Educational services in museums and other cultural institutions have intensified their work with schools and municipalities.

For several years, national museums have reduced tariffs for students at all levels, teachers, researchers, museology professionals, adults over 65 years and sponsors. On Sunday mornings, entrances are free for all visitors.

Book loans in Portuguese public libraries have no costs for users (see chapter 5.1.7 and chapter 8.1.4).

In connection with cultural participation, mention should be made of the *Choices Programme* which promotes the social inclusion of children and young people from disadvantaged social and economic backgrounds. With the support of local institutions (schools, training centres, associations and other social agents) responsible for designing, implementing and evaluating projects, this programme promotes inclusion through school, occupational training, leisure activities, and participating in the life of the community, amongst others. Some of these social action projects involve cultural and artistic activities, and play a key role in the social integration of the communities they target.

This government-sponsored programme is currently run by the ACIDI and funded by the Ministry of Labour and Social Solidarity and the Ministry of Education, Science, Technology and Higher Education.

8.3 Arts and cultural education

8.3.1 Institutional overview

A number of specific programmes have promoted art in schools, with a view to making younger children aware of the objects and purposes of art, namely:

- the national competition "My School Adopts a Museum" which encourages contact between schools and museums belonging to the National Museum Network by means of a collaboration agreement between the Ministry of Education (DGIDC) and the Ministry of Culture (former IPM);
- the "Art in Schools" project seeks to encourage direct contact between artists / creators and students at all levels. It provides support for three artists to work in schools. These artists (from several areas including visual arts and literature) are both specialist teachers and project partners;
- the *Cinemateca Júnior* project, launched in 2007 under a joint DGIDC and The Portuguese Film Archive Film Museum agreement; aims to involve the educational community (teachers and pupils from pre-school to secondary school levels); and
- the National Reading Plan (PNL), launched in 2006, is a government initiative, under the responsibility of the Ministry of Education, jointly with the Ministry of Culture and Minister of Parliamentary Affairs (*Council of Ministries Resolution n 86/2006*). PNL is a response to the concern regarding the literacy levels of the population in general, especially that of young people, which is significantly lower than the European average. It is implemented through a set of strategies aimed at promoting the development of skills in reading and writing, as well as the broadening and deepening of reading habits, especially among school populations.

As far as art teaching is concerned:

The Ministry of Science, Technology and Higher Education (MCTES) is the government body in charge of art teaching in higher education. Courses available are both public and private, and are mainly in the musical field. There are far fewer courses in theatre, visual arts and dance. If one looks at the supply of continuing higher education, the supply of courses is even more limited.

The Ministry of Education has commissioned a report on the specialised and vocational teaching of art in Portugal. This report argues for a complete and comprehensive reorganisation, especially in the fields of music and dance, at a practical level, in order to increase the number of places available to applicants. It suggests suspending the new curriculum rules for specialist art courses in secondary education, in the fields of dance, music and theatre, due to be implemented for the 2007-2008 school year, in order to provide the means to plug existing gaps; and it also suggest changes in the number of hours dedicated to certain types of content.

8.3.2 Arts in schools (curricula etc.)

Information is currently not available.

8.3.3 Intercultural education

Intercultural education programmes have been promoted in Portugal to make students aware of the importance of other cultures and of the dialogue with them.

Some examples:

The Mus-e Project: this is a multi-cultural educational project, international in scope, developed in a disadvantaged social environment, by the Portugal Menuhin Association (supported by the Ministry of Education). Its objectives are artistic, educational and social. It was first implemented in Portugal in the 1996-1997 school years and covers a very small number of state primary schools.

The European "All Different, All the Same" campaign was promoted by the Ministry of Education in 2006 and 2007. Its focus was on school sports activities, on increasing awareness in the school environment by means of the Living Human Rights project, publishing and distributing books and leaflets, and activities related to human rights, participation and diversity – exhibitions, meetings, debates, theatrical shows, music, dance, etc. Meetings with teachers and others were arranged on Children's Day to identify good practice in connection with integrating pupils from the gypsy community - the "Build Bridges, Talk About Us" project.

In connection with the European Year of Equal Opportunities for All, in 2007 a competition was held under the banner "My School Against Discrimination".

The Ministry of Education provides specialist language learning support to those whose mother-tongue is not Portuguese (with the possibility of providing tutors and involvement in specific projects).

8.3.4 Higher arts education and professional training

Information is currently not available.

8.3.5 Basic out-of school arts and cultural education (music schools, heritage, etc.)

Information is currently not available.

8.4 Amateur arts, cultural associations and civil initiatives

8.4.1 Amateur arts and folk culture

Local authorities play a key role in supporting cultural associations and local cultural activities. Volunteer associations make a significant contribution to local cultural life and they play a major role promoting theatrical performances, book fairs, film shows and folklore.

The Regional Directorates for Culture (Ministry of Culture) provide support to local non professional agents and projects in the traditional cultural domain (*Regulatory Decree n.* 34/2007).

The work of the INATEL Foundation should also be mentioned here. The new legal framework for this private foundation of public utility was established by the PRACE restructuring (see chapter 1, chapter 3.1 and chapter 7.1).

Presently, under the guidance of the Ministry of Labour and Social Solidarity, INATEL Foundation aims to offer social services, in the areas of social and senior tourism, and social and senior spas. The foundation also provides technical and financial assistance to col-

lective associates in the fields of ethnography, folklore, music, theatre and cinema and promotes cultural events such as festivals, conferences and performing arts productions.

The work of INATEL Foundation involves around 250 000 individual associates and 3 500 collective associates as well as a network of social hotels and a permanent structure of social and senior tourism and other facilities (a theatre and sport facilities).

Several competitions in artistic creativity are carried out annually covering areas such as video, visual arts, choral, philharmonic and orchestral music, new drama, story-telling and ethnography.

Recently, special attention has been given to training of associative managers and artistic performers. A specific programme was launched aimed to promote several workshops and brief courses all over the country regarding artistic and ethnographic issues. Technical visits to collective associates (e.g. philharmonics; folklore groups and amateur theatre groups) are also promoted in order to i) understand the main issues they face today and ii) guide their activity and performances in technical terms.

National Support Plans, which are organised for the areas of ethnography, music, and amateur theatre, include financial support as well as provision of equipment (such as musical instruments, light and sound equipment, footwear and traditional costumes) to collective associations with the objective of encouraging and developing their artistic activity.

8.4.2 Cultural houses and community cultural clubs

These entities of the third sector are usually supported by the Local Administrations, but partnerships with the public sector as well as with the private one are increasing in number.

Recently, "collective houses" for young people are emerging as a new initiative in Portuguese society.

In 2006 the Portuguese Youth Institute (IPJ) established four support programmes for youth associations:

- Juvenile Support Programme (*PAJ*), to develop youth association activities and informal youth groups;
- Infrastructure Support Programme (*PAI*), for investments in infrastructure and facilities for youth association activities and premises;
- Student Support Programme (*PAE*), to provide financial support for the activities of student associations; and
- Training Programme, to train association leaders for association activities

Those seeking support under these programmes must be registered with the National Register of Youth Associations (*RNAJ*). These associations also qualify for some tax exemptions and reductions.

8.4.3 Associations of citizens, advocacy groups, NGOs, and advisory panels

Information is currently not available.

9. Sources and links

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9.2 Key organisations and portals

Cultural policy making bodies

Governo de Portugal http://www.portugal.gov.pt

Ministry of Culture http://www.portaldacultura.pt/

Direcção Regional de Cultura do Alentejo http://www.cultura-alentejo.pt/

Direcção Regional de Cultura do Algarve http://www.cultalg.pt/

Direcção Regional de Cultura de Lisboa e Vale do Tejo http://www.cultura-lvt.pt/

Direcção Regional de Cultura do Centro http://www.culturacentro.pt/

Direcção Regional de Cultura do Norte http://www.culturanorte.pt/

Instituto para a Gestão do Património Arquitectónico e Arqueológico – IGESPAR, I.P. http://www.igespar.pt/

Cinemateca Portuguesa - Museu do Cinema

http://www.cinemateca.pt/

Direcção-Geral de Arquivos - DGARQ

http://www.dgarq.gov.pt/

Direcção-Geral das Artes – DGARTES

http://www.dgartes.pt/

Gabinete de Planeamento, Estratégia, Avaliação e Relações Internacionais – GPEARI http://www.gpeari.pt/

Inspecção-Geral das Actividades Culturais

http://wwwigac.ml.pt/

Biblioteca Nacional de Portugal

http://www.bn.pt/

Instituto do Cinema e do Audiovisual – ICA

http://www.ica-ip.pt/

Instituto dos Museus e da Conservação

http://www.ipmuseus.pt

OPART - Organismo de Produção Artística, EPE

http://www.opart.pt

Teatro Nacional D. Maria II

http://www.teatro-dmaria.pt

Teatro Nacional S. João

http://www.tnsj.pt/

Professional associations

Associação Nacional de Designers

http://www.and.org.pt

Associação Nacional de Teatro de Amadores – ANTA

http://www.anta.pt/

Associação Portuguesa de Bibliotecários, Arquivistas e Documentalistas – BAD

http://www.apbad.pt/

Associação Portuguesa de Editores e Livreiros – APEL

http://www.apel.pt/

Associação Portuguesa de Historiadores da Arte – APHA

http://www.apha.pt/

Associação Portuguesa dos Antiquários – APA

http://www.apa.pt/

Associação Profissional de Arqueólogos – APA

http://www.aparqueologos.org

Associação Profissional de Conservadores Restauradores de Portugal - ARP

http://www.arp.org.pt

GDA: Gestão dos Direitos dos Artistas

http://www.gdaie.pt

Sindicato dos Músicos

http://www.sindicatodosmusicosdeportugal.com/

Sociedade Portuguesa de Autores

http://www.spautores.pt/

Grant-giving bodies

Centro Nacional de Cultura

http://www.cnc.pt/

Direcção Geral do Livro e das Bibliotecas - DGLB

http://www.dglb.pt/

Fundação Calouste Gulbenkian

http://www.gulbenkian.pt/

Fundação Eugénio d'Almeida

http://www.fundacaoeugeniodealmeida.pt

Fundação Luso-Americana para o Desenvolvimento – FLAD

http://www.flad.pt/

Fundação Oriente

http://www.foriente.pt

Instituto Camões

http://www.instituto-camoes.pt/

Instituto Português de Apoio ao Desenvolvimento (IPAD)

http://www.ipad.mne.gov.pt

Fundação INATEL

http://www.inatel.pt

Cultural research and statistics

Observatório das Actividades Culturais

http://www.oac.pt/

CIES - Centro de Investigação e Estudos de Sociologia

http://www.cies.iscte.pt

CES – Centro de Estudos Sociais

http://www.ces.fe.uc.pt/

ICS – Instituto de Ciências Sociais

http://www.ics.ul.pt/

Instituto Nacional de Estatística

http://www.ine.pt/

Observatório da Comunicação – OberCom http://www.obercom.pt/

Culture / arts portals

Anamnese – [digital platform about Portuguese Contemporary Art between 1993-2003] http://www.anamnese.pt

ArtAfrica

http://www.artafrica.gulbenkian.pt/

Cultura on-line

http://www.culturaonline.pt

e-cultura

http://www.e-cultura.pt

Instituto Camões

http://www.instituto-camoes.pt/

INOV-Art

http://inov-art.dgartes.pt

Matriznet – Colecções do IMC http://matriznet.ipmuseus.pt/

Miso Music Portugal

http://www.misomusic.com

Monumentos.pt

http://www.monumentos.pt/

Prorestauro – Portal de Conservação e Restauro

http://www.prorestauro.com

Rede de Conhecimento das Bibliotecas Públicas http://rcbp.dglb.pt