

# Portugal

[REPÚBLICA PORTUGUESA]

RESEARCH PARTNER CENTRE  
**CONSELHO NACIONAL PARA A PROMOÇÃO DO VOLUNTARIADO**

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**COUNTRY FACT SHEET**

- **Population**                    2007: 10,599,095 inhabitant
- **Area**                            92,391 sq. Km
- **Population density**        2007: 114.7 inhabitants per sq. km

- **System of government**

Portugal is a democratic republic ruled by the Constitution of 1976 with four main sovereign organs which are the President of the Republic, the Assembly of the Republic, the Government and the Courts. The largest unit of classification is the one established since 1976 into mainland Portugal (*Portugal Continental*) and the autonomous regions of Portugal (Azores and Madeira). Portugal has an administrative structure of 308 municipalities (*concelhos*), which are subdivided into more than 4,000 parishes (*freguesias*). For Continental Portugal the municipalities are gathered in 18 Districts, while the archipelagos have a regional government directly above them.

The European Union's Nomenclature of Territorial Units for Statistics is also used. According to this system, Portugal is divided into 7 regions (*Norte, Centro, Lisboa, Alentejo, Algarve, Madeira, Açores*), which are subdivided into 30 sub regions (28 in Continental Portugal).

- **European elections**        24 European parliamentarians (2007).

- **Social security and welfare system**

The Portuguese social security system consists of the Public Social Security System, the Social Aid System and the Supplementary System.

The Public Social Security System, provided by the state, comprises the Insurance Subsystem, the Solidarity Subsystem and the Family Protection Subsystem. The Insurance Subsystem, which is a con-

tributory scheme, covers most employees or similar workers and also the self-employed (although the latter are subject to special conditions). The Solidarity Subsystem aims to guarantee, on the basis of the whole community solidarity, the fundamental rights in order to prevent and eradicate poverty and exclusion and provide support in proven situations of personal or family need that are not covered by the welfare subsystem. It comprises a non-contributory scheme, a special social security scheme for agricultural workers and a social integration income. The Family Protection Subsystem covers most people, providing assistance in cases of possible increased family expenditure, particularly in cases of disability or dependency.

The Social Aid System is provided specifically by public institutions, namely local authorities, and by private not for profit institutions, with the aim of providing special protection for more vulnerable (in particular, by making services and equipment available), as well as in other situations of financial or social need that are not covered by the solidarity subsystem of the Public Social Security System.

The Supplementary System, which is optional, comprises supplementary group-initiative schemes, individual initiative schemes and a public capitalisation scheme that is the responsibility of the State, still at the settlement stage, that will complement the benefits provided by the welfare subsystem and of which membership by workers will be voluntary.

Both the employer and the employee enrolled in the social security system are required to pay contributions. The rates generally applicable are 23.75% for employers and 11% (deducted at source from gross pay) for employees. The self-employed have to pay monthly contributions at a rate of 25.4% of their declared income (if covered by the compulsory protection scheme alone) or 32% (if they opt for the broad protection scheme).

- **Public health system**

The Portuguese health system is organised around a National Health Service (NHS), with some responsibilities delegated to re-



## National Council for the Promotion of Volunteering

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Created in 1999, the National Council for the Promotion of Volunteering, *Conselho Nacional para a Promoção do Voluntariado* (CNPV), is a Portuguese public entity, composed by representatives of public organisations (from several ministries) and private ones (from NGOs), with a broad range of activities concerning volunteering issues and domains.

The CNPV competences (established by law) and objectives are

- Promoting volunteering.
- Coordinating volunteering.
- Enhancing volunteers skills.

These competences and objectives are supported by CNPV information resources (CNPV website, publications, newsletter), that give visibility to CNPV and volunteering organisations activities.

CNPV is a consultative board, compulsorily consulted by law whenever policy measures concern volunteering, which issues statements and advises about Parliament's draft laws. CNPV meets once a month, in plenary. The analysis of strategies and the approval of policy measures drafts are done in the monthly meeting with all the Counsellors.

Inside CNPV, two specialised commissions were created: the Commission for Volunteering in Health and the Commission for Volunteering in Justice, since these domains needed a particular approach.

CNPV has a permanent technical team.

CNPV also organises and provides vocational training of trainers concerning specific aspects of volunteering activities, all over the country, having published the *Trainer's Handbook*.

### The local approach: Volunteering Banks

In 2001, a new project was launched: the creation of Local Volunteering Banks that aim to enhance the efficacy of volunteering at a local level.

These local and decentralised structures seek to facilitate the promotion of volunteering and to be a meeting point for individuals that are willing to volunteer and institutions that need volunteer contributions in order to support the exercise of their activities.

These banks are implemented by local municipalities or NGOs, with the technical support of the CNPV.

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# Glossary

## VOLUNTEERING ACROSS EUROPE

### **1 DEFINITIONS**

#### **1.1 VOLUNTEER**

According to the Portuguese law (Law no.71/98, article 3), a volunteer is an individual who commits himself/herself, in a free and responsible way, to perform voluntary activities within an organisation, according to his/her skills and time available, without the expectation of payment.

The condition of being a volunteer cannot derive from an existing relation of subordinated or autonomous labour or of patrimonial contents with the promoting organisation, but it is compatible with that of an associated partner, member and beneficiary of the same volunteer organisation.

#### **1.2 VOLUNTEERING ACTIVITY**

The Portuguese law (Law no.71/98, article 2) defines volunteering as a set of community or social interest activities carried out in an uninterested way by individuals, within the framework of projects, programmes or other intervention forms developed with not for profits purpose by public entities or private organisations for the benefit of needy individuals, families or communities.

The law expressly excludes from its scope of application those activities carried out, though without economic interest, in an isolated or sporadic way or on the basis of familiar, amicable or similar relations.

#### **1.3 VOLUNTEERING PROMOTING ORGANISATION**

Under the Portuguese law (Law no.71/98, article 4), the organisations legally allowed to recruit and coordinate volunteers are public entities of central, regional or local administration or other legal persons governed by public or private law, as well as socially recognised organisations, that gather the conditions to integrate volunteers and coordinate their activities.

The law also refers that these activities must have social and community interest and can be developed in the following domains: civic, social action, health, education, science and culture, patrimony and environment's defence, consumers' defence, cooperation for development, employment and vocational training, social reinsertion, civil protec-

tion, development of associative life and social economy, promotion of volunteering and social solidarity or others with similar nature. This list is not exhaustive, it contains a certain degree of overlap and disputable grouping and it is an open list to other domains which already exists or new ones that might be created (Catarino A., 2003).

#### 1.4 VOLUNTEER SUPPORT CENTRE

There is no official definition of volunteer support centre. Although, since 2001, local banks of volunteering have been created to fulfil the lack of a local level structure which could promote volunteering in a flexible and decentralised way. They are places where people who wish to volunteer and organisations interested in receiving volunteers get information and support.

The general objectives of these volunteering support centres are to manage the supply and demand side of volunteering, to encourage people to volunteering activities showing them its importance for

the society, to publicise volunteering projects and opportunities and also to contribute to the research in volunteering.

## 2 VOLUNTEERS ON VOLUNTEERING (INTERVIEWS)

The interviewees underline that, in Portugal, volunteering is an ancestral activity, spread all over the country in a variety of sectors, namely, social, health, cultural, religious and environmental. The voluntarism tradition of the Portuguese people is inherent to its nature and its history, especially from the 19<sup>th</sup> century onwards (though it goes far behind too), where some important charismatic historic personalities encouraged its development. In the 19<sup>th</sup> century, there was a growing number of volunteering involving institutions, some of which emerged due to the state inefficiency in the resolution of certain social issues. Two hundred years later, in a certain way, volunteering is still considered as a way to solve some social problems, resulting from the own social evolution.



# Historical overview

## VOLUNTEERING ACROSS EUROPE

### 1 BACKGROUND, EVOLUTION AND DISTINCTIVE TRAITS

There was a period of interruption to volunteering development before the revolution of 25<sup>th</sup> April 1974. In this period, there was an ideological volunteering directed to the sustainability of the New Order but, after the revolution, a tempestuous reaction to this kind of volunteering occurred, which shifted to certain democratic dynamism, as for example the active participation of citizens in order to value participative democracy. As a matter of fact, volunteering was marked by the ideologies that existed in Portugal at the time. Some very useful volunteering structures, created at that time, do not exist anymore or only a few remain, as for example the neighbourhood or residents associations, which were a new idea and, in the actual context, would be a very important factor of proximity for the solution of certain population problems. In fact, there is a great need of volunteering work in the social area and many social problems are not followed because they are not even known precisely due to the lack of social volunteering of proximity. In other domains, such as cultural or environmental, volunteering work is also needed, but in those areas the match between needs and volunteering capacity to provide answer or solutions is greater. In order to stimulate volunteering activities, it would be necessary that some volunteer involving organisations, at least the representative ones, develop some work by establishing contacts and providing training to the base volunteering groups. Only then, volunteering could cover all the territory and correspond to the different problems and it could even be inserted in wider politics of the social domain or other domains.

Volunteering started diversifying in various domains. Formerly, it was mainly in social assistance and health care, the first domain very much associated to churches and religion and the second with the Holy Houses of Mercy. The New Order limited or repressed the emergence of other volunteering forms, even if they did not have a politic ideology or nature. After then, a diversification of motivations and options emerged, going from the traditional domain of assistance to the idea of development, namely associated to environment, culture and social economy. It is a valorisation in diversification, since it qualifies volunteering, gives it recognition by bringing new perspectives of intervention and attracts more volunteers.

Notwithstanding being secular and spread all over the country, volunteering is not assumed enough since it has not been organised autonomously but instead it has been structured in organisations which also have non volunteer workers. There are some volunteering dynamisms, but a culture of volunteering is not yet there, at least in terms of collective awareness, leading to consider volunteering as a collective interest for the wellbeing of everyone. There are some challenges at the cultural and mentality level, but it takes time to influence them. On the organisations side vol-

unteering is more organised, whereas on the volunteers' side, they have to organise themselves in order to have a representative voice. Even at the level of organisations created to support and organise volunteers, sometimes there isn't a close cooperation between them, at least clearly notable. So, a great challenge is to get organised and to speak in one voice. Besides, a representative organ had never been created, until 2007, when the Portuguese Volunteering Confederation (*Confederação Portuguesa do Voluntariado - CPV*) was formed. Some interviewees consider that the CPV is needed to articulate actions, to develop activities in areas uncovered, to grant a basilar training in volunteering, to create a registration platform of volunteers and to represent effectively volunteers in the adequate entities. In this context, they believe that it is a very important structure for the autonomy and the construction of volunteering identity.

Being a volunteer requires a sense of responsibility, assumption of commitments, training and motivation. Sometimes, as a way of taking a position in the market, some institutions might call volunteer some people who do not have these characteristics or spirit in their genes. There might be some volunteers who search for some personal publicity or protagonism. In health care volunteering, there might be some individuals who are looking for the establishment of a contact network, which can be useful at some point in the future. There are also some organisations, who call themselves volunteers organisations but are in reality cooperating organisations, mainly with third countries institutions, in which some people volunteer to develop an activity in a third country in exchange of an amount of compensation. The existence of compensation subverts the spirit of volunteering, which is gratuity, and in reality instead of volunteer work there is some kind of camouflaged paid work. This situation is prejudicial for volunteering because it generates some suspicions.

Volunteering is free but that doesn't mean that there are no expenses, namely with the integration of new volunteers which requires a close follow-up in the beginning until they can be by themselves. Sometimes the work a volunteer is doing does not correspond to its

expectations and after a while he or she wants to do something different, which is understandable. Organisations are interested in making the volunteer feel totally integrated and as part of the organisation; otherwise the project will fail to succeed. In volunteering there is also the problem of adjustment between the offer and the demand. The number of people who wants to help is increasing, but sometimes people that accompany them in organisations are not so well prepared to guide them into the type of volunteering work more adequate for them. Frequently, it isn't easy to match needs of organisations and volunteers' expectations. The Local Volunteering Banks could play an important role in this field by giving technical support to organisations which integrate volunteers and by training volunteers.

Nowadays, there is a greater concern with training. Before, many people that wanted to work as volunteers were submitted to a curricular analysis or an interview and were selected or not according to the profile they had. Though, at some point, this wasn't enough and some initial training courses were created. Still, in some areas, namely in the health care, which is a very delicate area and therefore volunteers have to be well prepared before they can work by themselves, more well planned training actions were and are being developed in order to qualify volunteers for the activity they are going to undertake. So, to put it briefly, the big challenges volunteering is facing in Portugal are the affirmation of volunteering as the emanation of the society, well planned training actions and maintenance of the original motivation based on gratuity. Gratuity means that no compensation is paid, although volunteers have the right to be reimbursed of the expenses incurred into in their volunteer activity.

The number of volunteers in Portugal is significant, although it might be difficult to count them all, since one must also include those everyday people that, in anonymity, help and give some of their time freely to the needy ones and who are not integrated in any organised system of volunteering. Undoubtedly, the challenge in working with volunteers is great. Working and knowing people with a great diversi-

ty of characters and with rich life experiences, people willing to put themselves at the service of the others, who want to give to the ones that are in need, people who embrace noble causes, is considered a very gratifying work by the interviewees, essentially because they can still make a difference in a selfish and consumeristic society and contribute to a better world.

In these last years, great efforts have been developed in order to value this exercise of citizenship, which is mainly expressed through the dedication of citizens to causes of common interest. The valorisation of volunteering has occurred essentially through the recognition of the role of volunteers, beyond the traditional assistance dimension, as an agent of development and namely in the economic perspective. In fact, the estimation of the economic value of volunteering has to be done, since economy is an important pillar for development, not only market economy, but also economy that effectively contributes to the growth of GDP, as undoubtedly volunteering does.

## 2 ROOTS: BEFORE 1900

*"The Portuguese non-profit sector is at least as old as the Portuguese nation-state. The origins of the country date back to 1143 and organised charities existed in the territory even before then, inspired in important part by the Roman Catholic Church." (Franco R.C. et al, 2005)*

In Portugal, the development of the civil society has been deeply rooted in the Roman Catholic Church, related to charity activities. The Middle Ages are closely linked to the development of informal and organised voluntary work. This impulse of volunteerism in the medieval times was due to an attempt at solving social problems, namely through the creation of institutions which developed a true social protection system. This impulse also contributed to the growing awareness and affirmation of social rights.

Until the creation of the Holy Houses of Mercy by the end of the 15<sup>th</sup> century and from the beginning of the Portuguese country forma-

tion, the needs of the population, in the matter of assistance, had given birth to a multiplicity of initiatives, many of them of local nature, linked to the military and religious orders, to municipalities, to Craft Corporations and to private persons such as rich merchants, and others due to the devotion of monarchy, clergy and nobility. In the absence of an organised social security system, these initiatives were created to encourage men of all social classes to help the poor and the needy, but they were rudimentary and unorganised.

Basically, there were at that time four kinds of establishment of charity and assistance, namely, lodges (*Albergarias*), hospitals or hospices (*Hospitais*), leper hospitals (*Gafarias* or *Leprosarias*) and *Mercearias*.

- *Albergarias*, originally created for assisting pilgrims and others travellers and to that aim strategically located along the course of the journey, but also used as shelters houses for ill and poor people, they were supported by religious and military orders and some of them had little wards. They tended to disappear by the end of the Middle Ages with the progressive decline of pilgrimage or to convert into hospitals (*Hospitais*), sheltering sick people.
- *Hospitais*, created and oriented for the healing and shelter of poor and sick people.
- *Gafarias* or *Leprosarias*, destined to the admission of leprous people, giving them medical assistance and trying to diminish their suffering.
- *Mercearias*, originally destined to impoverished or ashamed noble old people, they usually were functioning next to chapels.

Social action through the Middle Ages did not limit itself to assistance or welfare work. It was also oriented to educational objectives, with the creation of the capitulary schools and the convent schools of the Benedictine Order and of the Cistercian Order, and to the affirmation of the human rights, in particular with the emergence of the Craft Corporations (*Corporações de Mesteres*) and various Brotherhoods (*Confrarias*) in the 12<sup>th</sup> and 15<sup>th</sup> century.

The Craft Corporations were developed as a corporative root of

occupational association to preserve the interest and provide mutual help for their members in the case of individual or familiar disasters or of bad institutions functioning, mainly through the creation of hospitals. Brotherhoods were voluntary associations of people (called brothers) mainly involved in beneficiaries activity targeted not only to their brothers (*Confrades*) but to non members too. An example was the creation in 1297 of the Good Men from Beja (*Bons Homens de Beja*) to support the construction of a house for the poor (Dias M., 2005).

Simultaneously, some other kind of self-help organisations were created to reduce the impact of disasters in people's life, specially common in some dangerous activities such as fishing and maritime, adopting self insurance models called the Maritime Commitments (*Compromissos Marítimos*) and Seamen Brotherhood (*Confrarias dos Mareantes*). Similar structures were formed in the rural zones, the Common Granaries (*Celeiros Comuns*), which were constituted to provide seed loans to poor farmers, during bad agricultural years.

The Portuguese Age of Discoveries, although a remarkable period, brought about many social changes and some problems too. A considerable number of men left behind women and children, frequently in precarious economic situations, and many peasants migrated to urban centres to look for a better life but lots of them were unable to find a job. This led to a rise of poverty demanding new forms of assistance not only from the public authorities but also from the community.

At that time, a major reform of the assistance model was under-

taken and it consisted of the creation of new institutions, the fusion and integration of many small existing institutions and the development of technical and administrative capacity.

By the end of the 15<sup>th</sup> century, a group of good and faithful Christians, supported by the Queen Leonor, assumed the compromise to dedicate themselves to the practice of the 14 works of mercy (Corporal<sup>1</sup> and Spiritual<sup>2</sup>) as much as possible and created the Holy Houses of Mercy (*Santas Casas da Misericórdia*) or Brotherhood of Mercy (*Irmandade da Misericórdia*). The idea behind their creation was that people who had became richer thanks to the Portuguese discoveries and maritime adventures could obtain salvation through works of mercy.

The main differences of these Holy Houses of Mercy from the previous medieval Brotherhoods were, on one hand, their geographical zone of influence that included not only the neighbourhood, the village, the city and the municipality but also, in many cases, the region and on the other hand, their assistance work which covered all the population. The Holy Houses of Mercy treated all human beings as brothers, independently of their race, language or culture. They installed and keep hospitals and others social equipments, putting them at the disposition of all the population. They constituted the only assistance system covering a wide area, namely, sickness, orphanhood, widowhood, poverty, infirmity, old age and death, that the Portuguese population knew since the beginning of the Portuguese Age of Discoveries until the Ancient Regime, or even to the middle of the 19<sup>th</sup> century, though its obvious decline after the second half of the 18<sup>th</sup> century.

<sup>1</sup>The seven Corporal Works of Mercy are: to redeem the captive and to visit the prisoners; to cure the sick; to cover the naked; to give food to the hungry; to give drink to whom have thirst; to shelter the pilgrims and the poor; to bury the dead.

<sup>2</sup>The seven Spiritual Works of Mercy are: to teach the simple; to give good advice to those who ask for it; to punish with charity the ones that make mistakes; to comfort the sad ones; to forgive those who have offended us; to suffer injuries with patience; to supplicate God for the living creatures and the deceased.

Many of those institutions have survived through the centuries and still exist in our days; others have been created in the last century. Most have social action as their main focus of activity and a few are now dedicated to health, although this has been an important field of activity until the nationalisation process of their hospitals in 1974. In fact, until then, they were responsible for the administration of almost all the existing hospital network.

*“Although charity (charity foundations, brotherhoods and hospitals) and mutual assistance organisations had seen considerable growth throughout the Middle Ages, it was in the 19<sup>th</sup> century that popular associations, co-operatives and mutual societies acquired extraordinary impetus through initiatives launched by the working class.”* (Ávila R.C., Campos J.L.M., 2007)

The 19<sup>th</sup> century marks a shift in volunteering. Its contrast relatively to the medieval period laid in its laic character, a democratic base, the consecration of rights and the contestation of the previous regime. With the dismantlement of the church privileges in 1834, the social economy exclusively based on Christian charity ends and a new phase begins, less conservative and more liberal, mostly aiming to help the poor people and to cover the risks that might cause poverty.

The mutualism movement in Portugal appeared after the second half of the 19<sup>th</sup> century, following the Liberal Revolution of 1820 and the abolition, in 1834, of the Arts and Craft Corporations which came from the Ancient Regime. The lack of institutions to help needy people in the new economical context brought about by the Industrial Revolution led to the reaction of the most vulnerable and defenceless social groups, through self-help organisations. The traditional function of the mutual help developed by the medieval corporations has been progressively assumed by workers’ groups, employees and independent workers, which contributed for a common fund, in order to face any eventuality such as sickness, work accident, permanent incapacity or premature death.

The Mutual Help Associations (*Associações de Socorro Mútuo*) were a kind of associations created by this new mutualism movement

that covered social risks and played an important role in the areas of health care, education and cultural activities. The Humanitarian Institutions of Voluntary Firemen (*Associações Humanitárias de Bombeiros Voluntários*) expanded all over the country, providing help to communities facing natural risks and disasters such as great fires and accidents. Other types of mutual associations emerged among the peasants: the Agricultural Mutuals (*Mútuas Agrícolas*), which provided credit and mutual insurance, and the Farmer and Peasant Unions (*Sindicatos Agrícolas*), which promoted solidarity among farmers.

There were also new forms of mutual help among the middle class, which were called *Montepios*, if they had an insurance profile, or *Caixas Económicas*, if they had a credit saving deposits profile. Strong business associations also emerged to defend the interest of new business leaders and capitalist, namely the Commercial Associations of Lisbon and Porto.

Many of these organisations, suffering from a fragile economic situation, combined with the lack of a legal framework and state support, failed to succeed. Only in 1891 a legal framework was created allowing the formation of Class Associations (*Associações de Classe*) between people from the same or correlated occupations to protect their interests and also permitting the integration of the growing union movement in Unions (*Uniões*) and Federations (*Federações*). It was also in the 19<sup>th</sup> century, around 1840, that the Cooperatives (*Cooperativas*) appeared in Portugal, and later, in 1867, the Basis Law of Cooperatives was created.

Trying to find a way to join employers and workers, the Catholic Church created the Catholic Circle of Workers (*Círculos Católicos de Operários*), by the end of the 19<sup>th</sup> century, to provide assistance and disseminate the Catholic perception to all workers. *“Acting more like a religious movement than a social one, and spending more time trying to recover religious influence rather than fighting for more relevant social needs, the Catholic Circle of Workers rapidly lost importance.”* (Franco R.C. et al, 2005).

### 3 THE BRIEF CENTURY: 1900 - 2000

At the beginning of the 20<sup>th</sup> century, Portugal faced some political disturbs: in 1910, the first Portuguese Republic was implemented, but in 1926 a *coup d'état* occurred and a new dictatorial form of government began which would mark the second and third quarter of the 20<sup>th</sup> century. The New Order (*Estado Novo*) or Salazar's Regime, in respect to volunteering, was a period of ambiguity and contradiction, where the laic and democratic volunteering of the 19th century was ostracised and repressed and *"the volunteering of medieval origin, naturally with some actualisations, was in some way favoured though with some reserves coming from three dynamics: the social welfare provision, and later the social security; the growing remunerated social work; and also the mirage of the State's omnipotence as a solution for all social problems."* (Catarino A., 2003)

According to the New Order ideology, the society would be organised around corporations which would reconcile the different interests existing in the Portuguese society. That meant that, on the one hand, workers, peasants and fishermen could join and be represented by associations, namely, Corporatist Trade Unions (*Sindicatos Corporativos*), Houses of People (*Casas do Povo*) and Houses of Fishermen (*Casas dos Pescadores*), on the other hand, industrialists, farmers and businessmen could be part and represented by Guilds (*Grémios*). Notwithstanding, there could only be one single Trade Union and Guild for each sector and one House of People or House of Fishermen for each locality, so workers, farmers, fishermen, industrialists and businessmen were forced to enrol their sector or local representative association. Some cooperatives were created, mostly in agriculture, but they were continuously surveyed and the formation of federations was forbidden. In fact, the New Order didn't allow freedom of association, political parties or civic movements, considering them prejudicial for the national interest.

In this political and social context, it is absolutely natural that not for profit organisations had declined in general and the mutualism movement in particular, especially after the introduction of the com-

pulsory social security system, which deprived them of one of their most important function. Right after the death of Salazar, in 1970, the creation of civil society associations was tolerated, as long as they didn't have political purposes. Dictatorship was close to its end, which came with the revolution in April 1974.

According to Catarino, after the revolution, with the reestablishment of the freedom of expression and association, there was a generalised intensification of volunteering and five principal tendency lines of development could be identified. The first one would be the "revolutionary volunteering", which emerged right after the revolution, in the political, syndical and cultural fields, and aimed for the global transformation of the society and the reduction of the social status, wages and richness inequalities throughout the mobilisation of all society. The second one would be the "renewal and partial substitution of traditional volunteering", more visible from the beginning of the eighties, after the adoption of the Private Social Solidarity Institutions Statute (*Instituições Particulares de Solidariedade Social*). Renewal because a new impulse had been given to the social institutions, with the enlargement of their action to include health, education, vocational training and housing, and partial substitution due to the increase of the paid employees in those institutions, in such a way that, in most of them, the only volunteers are the members of the social organs. The third one would be the appearance in the last decades of "new volunteering domains", namely, human rights, cooperation for development, local development, environment and patrimonial, nature and animals defence, coinciding with the continuous development of the old domains. Accompanying the growing diversity of domains there would be another tendency line, the fourth, which would be the "progressive approach between the different domains" in the last two decades, improved by the International Year of Volunteering in 2001. Finally, notwithstanding its vitality in the late years, volunteering appears to be in a phase of "disdain and impasse", due to a persistent suspicion of being something of the past and to the consideration that volunteer work is undervalued when compared to paid work, on the one hand, and the not for profit so-

cial sector is underrated when measured up to profit public or private sector, on the other hand (Catarino A., 2003).

It also has to be referred that the first State actions regarding the civil society weren't totally supportive, as the nationalisation of the hospitals that the Holy Houses of Mercy administrated and their posterior integration in the public health network reveal. However, gradually the Portuguese Government took conscience of the importance of establishing partnerships with the civil society, first adopting a law, in 1981, which allowed the devolution to the Holy Houses of Mercy of their hospitals in a case by case basis, and later with the approval of the statutes and reinforcement of the field of action of the Private Social Solidarity Institutions.

By the end of the 20th century, the Portuguese state approved the framework law of volunteering and created the National Council for the Promotion of Volunteering (*Conselho Nacional para a Promoção do Voluntariado*), which is a consultancy organ to the Minister of Labour and Social Solidarity and it is composed by advisers, who represent several ministries, and by not for profit organisations at a national level. This National Council is responsible for the promotion, qualification, research and organisation of volunteering in Portugal.

#### 4 WHERE WE STAND: 2001 - 2008

Nowadays, due to the actual crisis that the Welfare State is facing, there is a growing interest in the renewal of social organisations, considering the important role that they can play in the domain of the complementary social protection, namely in fields such as health, social action and populations' wellbeing. In fact, the reduction of the number of people in the workforce and the growing life expectancy will need a new commitment from civil society, in order to find new ways of supporting social risks, given that equity and solidarity con-

cerns everyone. More recently, the Portuguese State recognised the principles of social subsidiarity and complementarity<sup>3</sup> in the provision of state-financed welfare social services, giving the Private Social Solidarity Institutions the responsibility to provide them.

With the adoption of the framework law of volunteering at the end of the 20<sup>th</sup> century a new impulse was given to the dissemination and recognition of volunteering, especially with the realisation in 2001 of the International Year of Volunteering. Some contributes were produced for the elaboration of a National Plan for the Promotion and Divulcation of Volunteering, whose main objective is the promotion of volunteering, in every locality and in its different domains, and its contribution for the prevention and effective solutions of the problems it takes care of. Qualification, organisation and representation and the match between demand and supply of volunteers as well as the relationship with the state were identified as basic activities to develop. Consequently, the following priorities were defined: organisation and expansion, qualification and profundity. Organisation must be realised by the own volunteering institutions in order to define common orientations and convenient representation, through, namely, the creation of unions, federations or even confederations. Recently, a step forward has been given in this area, with the creation of the Portuguese Volunteering Confederation (*Confederação Portuguesa do Voluntariado*). Expansion means the implementation of volunteering in all the Portuguese localities. The Local Volunteering Banks (*Bancos Locais de Voluntariado*), although a recent reality (the first one has been created in 2002, with nowadays about 70 Local Banks existing in the country), have an important role to play in this area. Qualification (formal or informal, initial or continuous) and lifelong learning are extremely important in volunteering as they also are in other fields and consequently they must be integrated in the organisation's own qualification processes. Finally, profundity is linked to the continuous efforts for the preservation of the authenticity of volunteer

<sup>3</sup>Law no.32/2002 of 20<sup>th</sup> December 2002, Framework Law of Social Security, articles 12, 16.

work, the intervention in causes and prevention of problems and the contribution for development and social transformation.

## 5 VOLUNTEERING NOW (INTERVIEWS)

In simple and reductive terms, volunteering in Portugal seems to be covering some gaps in certain fields where the state hasn't been able to reach. But this is one reductive vision of volunteering. In reality, volunteering is much more than that. The positive vision is to consider volunteering as a movement of raising consciousness of the problems that society and people face and the constant search of solutions for those problems. Volunteering is not intended to compensate things that aren't done, although this currently happens, but it is open to new perspectives, to new solutions.

Some steps have been taken in order to value and recognise volunteering but there is still a lot to do in this area. Volunteering is participative, interactive, questioner and proposer or, in other terms, volunteering is an agent of transformation. Theoretically, the role of volunteering is exalted and the active participation of the civil society is encouraged, but in effective terms the right conditions to do so have not been created. Maybe, the increased training of volunteers can help to change the way volunteering is actually perceived and shift to what it should be, that is, volunteering as an agent of development and as a social movement in a dynamic perspective.

The society is very complex and so are the problems it faces. Thinking that the state can solve everything is an illusion. The society has a role to play in this field, namely through volunteering. Besides, some activities are more efficiently led by the not for profit private associations. Many of them have some advantages, namely, proximity to the communities, capacity and know-how. Volunteering, organised and professional, can have an important role in rural areas where there are different needs when compared to urban areas. Informal solidarity networks are common in rural areas. Besides those solidarity networks, an evolved and aware volunteering has another kind of

perception of the problems and needs of society. Hence, it can go far beyond those informal self-help networks, providing a more structured and effective response to problems identified.

Volunteering has evolved to a more organised form. The volunteering involving organisations have a complementary role in the society. Corporate entities should also assume their social responsibility and encourage their own employees to volunteer. Additionally, experience in volunteering should also be valued in the curriculums, as it already happens in a significant number of developed countries.

It is curious to note that what today are called the "social security occupational workers" were, some centuries ago, volunteers who had developed a kind of activity in the social field that gradually became more and more professional.

It can even happen that some professional activities will turn into volunteering activities in the future due to economic motives. So there is in fact a permanent dialectic between volunteering and professional work. Volunteer work should be in continuity and a complementary line of professional work, with very well defined functions. All kind of volunteering activities, namely in the cultural, social, health or environmental fields, have these characteristics. Unfortunately, there still is a general and erroneous idea, very common in Portugal, that a volunteer is a worker equivalent to a less qualified paid employee.

Volunteering has already been regulated through the publication of laws and the civil society gives it public recognition. However that is not enough. To know the role volunteering is playing, be aware of the problems it deals with and take decisions or make proposals in order that volunteering corresponds increasingly to its demands, is fundamental. This hasn't been happening in part due to the fact that volunteering is integrated in organisations of professional workers and frequently volunteers have positions in those organisations that aren't at the decisional level. The confederation that has been created can contribute for the social affirmation of volunteering as volunteering activity itself and not merely as a group of people who have the support of some institutions.



Volunteering is important for the personal development of any individual. To be a volunteer is to exercise active citizenship; to participate in a compromised and committed way for the attainment of a certain aim; to give oneself to the others without any retribution; and

to feel that a contribution for a better world is being done. It is much more than simply wanting to help. It requires to be available, committed and responsible and most of all to believe that one's cooperation can make the difference.

## 1 OVERVIEW OF LAWS AND REGULATIONS

### VOLUNTEERING ACROSS EUROPE

Internationally, there is a wide range of terms and concepts for the third sector: not for profit organisations, social or solidarity economy, nongovernmental organisations, third system, alternative economy and independent or volunteer sector. However, this sector is commonly accepted as having five main characteristics, which are formal organisation, private institution (meaning institutionally separate from the government), not for profit distributing, self-governing and voluntary membership or contribution (including non-remunerated participation in the organisation activities).

In the Portuguese civil law system, there isn't a unified legal framework for not for profit organisations. Instead, there is a wide range of laws that apply to the different kinds of organisations of the third sector.

- Constitutional Law no.1/2005 of 12<sup>th</sup> August 2005. It approves the 7<sup>th</sup> revision of the Constitution of the Portuguese Republic.

The Constitution of the Portuguese Republic refers, as a fundamental principle of the economic organisation, to the coexistence of the public sector, the private sector and the cooperative and social sector (article 80), including in the third one the means of production that belong to and are managed by cooperatives in accordance with cooperative principles, the community means of production, owned and managed by local communities, the means of production that are utilised by workers' collectives and the means of production owned and managed by not for profit collective persons, that have the principal objective of social solidarity, in particular those of a mutual nature (article 82). Accordingly, in general terms, three major types of organisations can be identified in the third sector: private social solidarity institutions, mutual associations and cooperatives.

- Law Decree no.119/83 of 25<sup>th</sup> February 1983. It approves the Statute of the Private Institutions of Social Solidarity. This law decree emphasises the importance of the Private Institutions of Social Solidarity for the resolution of the citizens' social problems and the obligation of the state to recognise, valorise and support those institutions. It contains:
  - The definition of the concept of Private Institutions of Social Solidarity, wider than the one that existed before, their objectives and the juridical legal and grouping forms they can assume.
  - Norms relative to the constitution, modification, extinction, and internal organisation of the institutions as well as delimitation of the support and the intervention scope of the state.
  - An autonomous chapter with the special regime of religious organisations, which includes a particular section for the Catholic Church institutions.
- Law Decree no.72/90 of 3<sup>rd</sup> March 1990. It approves the Mutual Associations Code, which until then was fragmented in three legal documents.

It establishes seven new guidelines:

- Allows the creation of mutual associations with a socio-professional basis of solidarity.
- Reformulates the benefit schemes, allowing the associations to pursue collective benefits modalities, simultaneously with the existing individual benefits modalities, as well as the management, by mutual associations, of complementary professional regimes of social security.
- Reformulates the financing schemes and methods of the mutual associations.
- Allows the mutual associations to develop, besides their objectives of complementary protection in the domains of social security and health, other activities of social protection, namely in the social action sector, and globally the promotion of a better quality of life for their associates and their families.
- Valorises the freedom and autonomy of organisation and functioning of the mutual associations, compensated with a greater responsibility of their associative organs.
- Determines rules for funds and financial applications with the aim to protect the interest and rights of associates and beneficiaries.
- Attenuates the intervention of the State.
- Law no.51/96 of 7<sup>th</sup> September 1996. It approves the Cooperative Code.

This law decree establishes a set of guideline principles for cooperatives, which integrate the Cooperative Identity Declaration adopted by the International Cooperative Alliance:

- Free and voluntary participation of all the people willing to use their services and to assume members' responsibilities.
- Democratic management by members.
- Economic participation of members.
- Autonomy and independence of the cooperative.
- Promotion of education, training and information of the cooperative's members to assure an effective development of the cooperative and promotion of information of the public, in general, about the nature and advantages of cooperation.

- Inter-institutional cooperation, at the local, regional national or international level.
- Care for the community.

It also contains:

- The definition of cooperatives, their fields of activity and the structural levels of organisation (individual cooperatives, associations of cooperatives or federations and associations of federations or confederations).
- Norms relative to the constitution, internal organisation, transformation and extinction of cooperatives as well as the rights and duties of its members.
- The institution responsible for the emission of cooperative credentials, the INSCOOP (*Instituto António Sérgio do Sector Cooperativo*).

Several sectoral laws have been published, as many as the cooperatives' activity fields identified in the Cooperative Code, which establish complementary legislation, as for example the Law Decree no.7/98 of 15<sup>th</sup> January 1998 that regulates the Social Solidarity Cooperatives. Besides, the Law no.101/97 of 13<sup>th</sup> September 1997 extends to the Social Solidarity Cooperatives the rights, duties and benefits of the Private Institutions of Social Solidarity.

Additionally to these three major type of institutions, there are also other kind of not for profit organisations, the Non-Governmental Organisations (NGO) that are subject to specific legislation.

- Law no.35/98 of 18<sup>th</sup> July 1998. It establishes the Statute of Environmental Non-Governmental Organisations, defining its concept, the proceedings to be recognised as collective persons of public utility, the rights of participation in the definition of environmental politics, of being represented in many public bodies and of notarial and fiscal exemptions, as well as its registration in an official organ, the Environmental Portuguese Agency (ex-IPAMB, Environmental Promotion Institute).
- Law no.66/98 of 14<sup>th</sup> October 1998. It establishes the Statute of Non-Governmental Organisations of Cooperation for Development, automatically recognised as collective persons of public utility, defining its concept, juridical nature, objectives, domains of activity, group-

ing form and the right of notarial and fiscal exemptions, as well as its registration in the Portuguese Foreign Affairs Ministry. It doesn't apply to Non-Governmental Organisations of Cooperation for Development that have profit, political, syndical or religious purposes neither to the ones that develop military cooperation activities.

### 1.1 HISTORICAL OVERVIEW OF THE LEGAL FRAMEWORK

The most important changes on the Portuguese juridical framework occurred mainly after the revolution of 1974, since, under the dictatorship period, there was a general hostile environment to associative movements. The freedom of association, consecrated in the Portuguese Constitution of 1976, was fundamental for the rebirth of the third sector, mainly composed by not for profit associations.

In 1979, the Law Decree no.519-G2/79 of 29<sup>th</sup> December 1979 approved the Statutes of the Private Institutions of Social Solidarity, unifying in one law matters that were dispersed through fragmented legislation, namely, the Statutes of Social Assistance (1944) and Statutes of Health and Assistance (1963). However, since it was restricted to institutions that supplied only social security services, later in 1983, this statute was revised in order to include health, education, vocational training and housing in the field of activity of the Private Institutions of Social Solidarity.

Before the publication, in 1981, of the juridical regime of the mutual help association (Law Decree no.347/81 of 22<sup>nd</sup> December 1981), the existing legislation basis for mutual associations dated back to 1931, notwithstanding some fragmented legislation that had been published in between. Nineteen years later, with the evolution of the mutual associations objectives and their scope of activity, a revision of the legislation was undertaken and a new code was created, the Mutual Associations Code, reuniting dispersed legislation, with the purposes of encouraging the mutualism movement and allowing the creation of new institutions with a socio-professional basis of solidarity and collectives protection forms.

The first Portuguese law exclusively and specifically dedicated to

cooperatives was established in 1867 and was called *Lei Basilar das Cooperativas*. Between 1867 and 1980, year of the publication of the Cooperative Code (Law Decree no.345/80 of 9<sup>th</sup> October 1980), almost 150 legal documents, referring to cooperatives, had been published. For the first time, the Cooperative Code of 1980 was conceived with the cooperation and auscultation of the main organisations of the cooperative sector. In 1996, the Cooperative Code was revised (see above) and in 1998 a fiscal regime especially directed for cooperatives was instituted, called the Cooperative Fiscal Statute.

### 1.2 NORMS SUPPORTING VOLUNTEERING

Before the publication of the basic legal framework of volunteering, in 1998, some programmes promoting youth volunteering were implemented:

- Law Decree no.168/93 of 11<sup>th</sup> May 1993. It establishes the programme Young Volunteers for Solidarity, regulated by the Decree Order no.685/93 of 22<sup>nd</sup> July and later reformulated by the Decree Order no.745-G/96 of 18<sup>th</sup> December.
- Law Decree no. 205/93 of 14<sup>th</sup> June 1993. It establishes the programme Young Volunteers for Cooperation, regulated by the Decree Order no.686/93 of 22<sup>nd</sup> July 1993 and later reformulated by the Decree Order no.745-H/96 of 18<sup>th</sup> December 1996.

The programmes Young Volunteers for Solidarity and Young Volunteers for Cooperation were the first officially recognised volunteer programmes in Portugal, the first one destined to young people aged 15 to 30 and the second one to young people between 18 and 30 years old. In both cases, volunteers must have undergone at least obligatory basic education. The legislation also refers to the duties of the promoting entities, of the young volunteers and of the public body responsible for the programmes management.

The objectives of the programme Young Volunteers for Solidarity are to motivate the development of youth volunteering and to contribute for the social and cultural training of young people, through their participation in useful social or communitarian projects

or actions, namely in the domains of fight against poverty, support to socially excluded groups, education and teaching, prevention of drugs and alcohol abuse and preservation of the environment and patrimony.

The objectives of the programme Young Volunteers for Cooperation, later designated *Lusíada Programme*, are to encourage the development of international cooperation projects for young volunteers with Portuguese as an official language speaking African Countries, in the context of the Community of Portuguese Speaking Countries (*Comunidade dos Países de Língua Portuguesa – CPLP*), within the domains of health, education and teaching, vocational training, preservation of the natural, cultural and historic patrimony, establishment of libraries and centres for the diffusion of the Portuguese culture and language, promotion of youth associations, social integration, scientific and technical research and actions of humanitarian relief.

More recently, in 2005, a new programme for youth volunteering was adopted, the Youth Volunteering for Forestry (Ministers' Council Resolution no.63/2005 of 14<sup>th</sup> March 2005), which aims to preserve the forestry resources and related ecosystems, to prevent forestry fires and to promote surveillance and recuperation of burned areas, through the participation of young volunteers, between 18 and 30 years old, in annual projects, generally during the months of June, July, August and September. Additionally, in 2007, the Ministers' Council Resolution no.94/2007 of 20<sup>th</sup> July 2007 created the National Agency for the Management of the European Programme Youth in Action, which integrates a set of actions to promote an active citizenship participation, in general and particularly in Europe, of young people, namely through European Voluntary Service.

In 1998, the basic legal framework on volunteering was published, with the aim to promote and ensure the solidary participation of all citizens in volunteering actions. Since some aspects of the framework needed to be clarified and regulated, almost a year later a new Law Decree was published.

Law no.71/98 of 3<sup>rd</sup> November 1998. It approves the Framework Law on Volunteering, later regulated by Law Decree no.389/99 of 30<sup>th</sup> September 1999.

The Law no.71/98 defines the basic legal framework under which volunteering should be developed, recognising its social value as an expression of an active citizenship and consequently promoting and ensuring its autonomy and diversity. It establishes the principles of volunteering, namely solidarity, participation, cooperation, complementary, gratuitousness, responsibility and convergence. It includes the definitions of volunteering activity and volunteers, the organisations allowed to recruit and coordinate volunteers, the domains in which volunteering activities can be developed, the rights and duties of volunteers and the relationship between the volunteers and the volunteers involving organisations.

According to the law, the volunteers have the following rights:

- To access initial and ongoing training in order to improve their work.
- To receive a volunteer identification card.
- To be included in the volunteer social security framework.
- To work under proper health and safety conditions.
- To be absent from their work with due justification, if they are employed, when the volunteer involving organisation needs them, namely for urgent missions in situations of emergency, public calamity or similar occurrences.
- To receive economic compensation, pensions and corresponding benefits legally approved in case of accident or illness related to their volunteer activity.
- To have their volunteer programme established under an agreement with the organisation regulating their mutual relations as well as the nature, contents and duration of the volunteer project.
- To be actively involved in the design of their volunteering programme.
- To benefit from special conditions in the use of public transport as volunteers.
- And to be reimbursed for their duly justified expenses within the limits eventually established by the volunteer organisation itself.

On the other hand, volunteers have the following duties:

- To respect the deontological principles of the activity they perform and the private life of their beneficiaries.

- To follow the rules governing their organisation and their corresponding programmes or projects.
- To perform their tasks diligently, impartially and with solidarity.
- To participate in the training programmes related to their volunteering.
- To make proper use of the material resources that are put at their disposal.
- To collaborate with their professional colleagues, respecting and following their decisions.
- To officially represent their organisations only when they have been expressly authorised to do so.
- To guarantee the regularity of their volunteer work, according to the programme agreed with the organisation.
- To make proper use of their volunteer identification.

The volunteers and the volunteers involving organisations must agree on a volunteering programme, which has to include the nature and scope of the activity to be developed, the periodic evaluation of the voluntary work done, the training needed to perform the work and the means to solve any eventual conflicts that may happen between them.

The Law Decree no.389/99 contains operational instruments in order to allow the effective applications of the volunteers' rights and to promote and consolidate a qualified and socially recognised volunteering. It also contemplates the creation of a National Council for the Promotion of Volunteering (*Conselho Nacional para a Promoção do Voluntariado - CNPV*), which is responsible for the promotion, coordination and qualification of volunteering, namely through the following actions:

- Development of the needed actions for the effective knowledge and characterisation of volunteers.
- Issue of identification cards to volunteers.
- Support volunteering involving organisations in the implementation of the volunteers insurance.
- Provide for the celebration of agreements on the utilisation of public transports by volunteers.
- Promotion, in cooperation with the volunteering organisations,

of training actions for volunteers.

- Technical support to volunteering organisations, through the availability of information about volunteering.
- Sensitisation of the society for the importance of volunteering as a form of active citizenship, promoting debates, conferences or other similar initiatives about volunteering.
- Promotion of social studies and research about the attitudes, predilections and motivations of people for volunteering, in cooperation with research centres linked to Universities.
- Sensitisation of enterprises for the curricular valorisation of the young's experience acquired through the development of volunteering activities, especially when they are looking for a first job.
- Follow-up of the application of the present law and suggestion of adequate measures to its development and improvement.

The Resolution no.50/2000 of 30<sup>th</sup> March 2000 of the Council of Ministers refers that the CNPV depends directly on the Minister of Labour and Social Solidarity and defines its composition and its internal organisation.

## 2 PARTICIPATION IN PUBLIC POLICY MAKING

In general terms, the Portuguese Constitution, adopted in 1976 and revised in 2005, consecrates the political participation of all citizens, or legally elected representatives, as an active and democratic citizenship.

More specifically in relation to not for profit bodies, the Framework Law of Social Security (Law no.32/2002 of 20<sup>th</sup> December 2002), adopted by the Portuguese state in 2002, refers in its article 5 that the national social action system is undertaken by public institutions, namely, municipalities and by the not for profit private institutions. It also defines the principles of the social security system and among them the following:

- Social subsidiarity, which recognise the essential role of individuals, families and intermediate bodies for the pursuit of the social security objectives.

- Complementary, which relates to the articulation of the various forms of social protection (public, social, cooperative, mutual and private) in order to improve the coverage range of situations and to promote contractual share of responsibilities.
- Participation, referring to the responsibility of all the interested parts in the definition, planning and management of the system and in its follow-up and evaluation.

In respect of the network of social action services and facilities, the law mentions that the state must promote and encourage the organisation of a national network of social services and equipments for the support of individuals and families, involving the cooperation and participation of the public bodies, private institutions of social solidarity and other not for profit institutions of public utility. The social action support can be developed through subventions, cooperation programmes and protocols with the private institutions of social solidarity, duly registered in the officials records, or by directly financing the beneficiary families.

With regard to volunteering, the article 91 expressly refers that the law encourages volunteering and the free, responsible and solidarity participation in actions of that nature, with the aim of an effective community involvement in the development of social action. The Framework Law of Health (Law no.48/90 of 24<sup>th</sup> August 1990) also foresees the possibility of not for profit making, as well as profit making, private institutions participating in the National Health System (NHS), with the state support, namely through the promotion of the mobility of professionals NHS workers to the private sector and incentives for the creation of private unities at the level of the regional health administrations.

### 3 FISCAL POLICIES

In general, Portuguese private not for profit organisations are subject to the same tax treatment as for profit making organisations, excluding credentialed cooperatives, which have a specific fiscal status, and institutions that gain the qualification of public utility.

The Corporate Income Tax Code (Law Decree no.198/2001 of 3<sup>rd</sup> July 2001) determines, in article 10, income tax exemptions for collective persons of public utility and of social solidarity, as well as for public benefit collective persons which have, exclusively or mainly, scientific, cultural, environmental protection, charity, assistance, beneficence or welfare purposes. This tax exemption has to be authorised by the Minister of Finance and the institutions are required to reinvest 50% of their annual net income, within four years, in the development of the activities or purposes that have justified its public utility recognition. Furthermore, the social organs members of the institution cannot have any direct or indirect interest in the operating revenues of the organisation activities. This kind of tax exemption extend to organisations, legally constituted, that develop cultural, recreational and sports activities (article 11), as long as they do not distribute dividends among their members or board members, who also cannot have any direct or indirect interest in the operating revenues of the organisation activities.

These institutions can also benefit from value-added tax (VAT) exemptions (Law Decree no.102/2008 of 20<sup>th</sup> June 2008 that approves the Value-Added Tax Code), having to respect more or less the same conditions already mentioned and provided that the prices they practice are ratified by public authorities, when it is due, and that they do not directly compete with corporate taxpayers. The basis for the municipal tax on charged transmissions of immovable property, laid down in a specific code (IMT Code), also enumerates tax exemptions for legal persons of public administrative utility, private institutions of social solidarity and acquisitions made by museums, schools, libraries, associations of scientific culture, literary or artistic and charity, as long as the immovable property are designed, directly or indirectly, to the execution of their statutory object. In addition, donations of immovable properties, or other goods, to these institutions are exempted from stamp duty.

The Law no.85/98 of the 16<sup>th</sup> December 1998 has approved the Cooperative Fiscal Statute that establishes several tax exemptions or reductions for cooperatives with a legally emitted credential.

#### 4 ROLLS AND REGISTERS

The Private Institutions of Social Solidarity, as well as other not for profit institutions that pursue social solidarity aims, have to be registered on the Social Security General Directorate (*Direcção-Geral da Segurança Social*), a department of the Ministry of Labour and Social Solidarity. The registration implies that the constitution act, the statutes and all the eventual subsequent changes must be communicated to the Social Security Directorate. Actually, there are more than 4,900 private institutions of social solidarity registered and more than 100 cooperatives that also have this status.

In the case of the Mutual Associations, the constitution act, the statutes and all the following modifications, the benefits granted regulation and the cooperation agreements established with other entities have also to be registered on the Social Security General Directorate. With this registration the mutual associations are automatically recognised as collective persons of public utility. In the Social Security General Directorate files, there are actually about 93 mutual associations registered.

The INSCOOP (*Instituto António Sérgio do Sector Cooperativo*) is the competent authority for the emission of the cooperatives credential which confirms their legal constitution. The constitution act, statutes, as well as their alterations and the management and annual account reports, duly approved by the general assembly, have to be sent to the INSCOOP. In 2007, the INSCOOP registered almost 3,300 cooperatives, of which 192 were Social Solidarity Cooperatives and 569 were Housing and Building Cooperatives. It also registered 23 federations of cooperatives and 2 confederations of cooperatives.

The Environmental Non-Governmental Organisations are registered on the Environmental Portuguese Agency (former IPAMB, Environmental Promotion Institute), if they have at least 100 members. They are required to send them the annual activity and accounts reports, duly approved by their governing organs, as well as any subsequent modification they have made after their inscription.

The Non-Governmental Organisations of Cooperation for Development are automatically recognised as collective persons of public

utility after their registration on the Portuguese Institute of Support for Development (*Instituto Português de Apoio ao Desenvolvimento*) of the Portuguese Foreign Affairs Ministry. In December 2006, there were 112 Non-Governmental Organisations of Cooperation for Development registered.

The Youth Portuguese Institute (*Instituto Português da Juventude*) keeps a national registration of juvenile associations, which have to be registered if they want to obtain certain supports defined in the Framework Law of Juvenile Associations. In 2004, 1,250 youth associations were registered, with almost 350 thousand young members.

#### 5 LIST OF LAWS AND REGULATIONS

Law Decree no.119/83 of 25<sup>th</sup> February 1983 - *Statute of the Private Institutions of Social Solidarity*.

Law Decree no.72/90 of 3<sup>rd</sup> March 1990 - *Mutual Associations Code*.

Law no.51/96 of 7<sup>th</sup> September 1996 - *Cooperative Code*.

Law Decree no.7/98 of 15<sup>th</sup> January 1998 - *Social Solidarity Cooperatives*.

Law no.101/97 of 13<sup>th</sup> September 1997 - *Extension to the Social Solidarity Cooperatives of Rights, Duties and Benefits of the Private Institutions of Social Solidarity*.

Law no.35/98, of 18<sup>th</sup> July 1998 - *Statute of Environmental Non-Governmental Organisations*.

Law no.66/98, of 14<sup>th</sup> October 1998 - *Statute of Development Non-Governmental Organisations*.

Law no.71/98 of 3<sup>rd</sup> November 1998 - *Framework Law on Volunteering*.

Law Decree no.389/99 of 30<sup>th</sup> September 1999 - *Regulation of the Framework Law on Volunteering*.

Resolution no.50/2000 of 30<sup>th</sup> March 2000 of the Council of Ministries - *Composition and Action of the National Council for the Promotion of Volunteering*.



Law Decree no.168/93 of 11<sup>th</sup> May 1993 - *Programme Young Volunteers for Solidarity.*

Law Decree no.205/93 of 14<sup>th</sup> June 1993 - *Programme Young Volunteers for Cooperation.*

Decree Order no.685/93 of 22<sup>nd</sup> July 1993 - *Regulation of Programme Young volunteers for Solidarity.*

Decree Order no.686/93 of 22<sup>nd</sup> July 1993 - *Regulation of Programme Young volunteers for Cooperation.*

Ministers Council Resolution no.63/2005 of 14<sup>th</sup> March 2005 -

*Regulation of the Programme Youth Volunteering for Forestry.*

Ministers Council Resolution no.94/2007 of 20<sup>th</sup> July 2007 - *Creation of the National Agency for the Management of the European Programme Youth in Action.*

Law no.32/2002 of 20<sup>th</sup> December 2002 - *Framework Law of Social Security.*

Law Decree no.40/89 of 12<sup>th</sup> February 1989 - *Voluntary Social Insurance.*

Law no.48/90 of 24<sup>th</sup> August 1990 - *Framework Law of Health.*

# Volunteers involving organisations

## 1 ORGANISATIONAL FORMS

### VOLUNTEERING ACROSS EUROPE

In Portugal, the not for profit organisations can have the following juridical forms: Private Institutions of Social Solidarity (including Mutual Associations), Cooperatives or Non-Governmental Organisations (NGO).

The **Private Institutions of Social Solidarity** are institutions without profit purposes, created by the private initiative of people, with the aim of giving organised expression to the moral duty of solidarity and justice among individuals, not administrated by the state or a local public body. Through the granting of goods and services, the Private Institutions of Social Solidarity pursue, among others, the following purposes:

- Child and youth support.
  - Family support.
  - Social and communitarian integration support.
  - Protection of elderly and handicapped citizens and in all the situations of diminishing means of subsistence or capacity to work.
  - Health promotion and protection, throughout preventive, curative and rehabilitative medical care.
  - Citizens' education and vocational training.
  - Resolution of population's housing problems.
- They can assume one of the following forms:
- Associations, namely:
    - Social solidarity associations.
    - Social action volunteers' associations.
    - Mutual help associations.
  - Social solidarity foundations.
  - Brotherhoods of mercy.

These institutions can be grouped in Unions, Federations or Confederations.

**Mutual associations** are private institutions of social solidarity, with an unlimited number of members, undetermined capital and undefined duration, which develop, mostly through membership fees, mutual help aims for the benefit of their members and their families, by the terms established in the Mutual Associations Code. Generally, their aims are to provide social security and health benefits to their associates and their relatives, but they can also develop other activities of social protection, through the organisation and management of social support services and facil-

ities, or of improvement of quality life, namely in the moral, intellectual, cultural and physical areas. The social benefits provided can include invalidity, retirement or survivor pensions, other cash benefits for illness, maternity, unemployment, accidents at work or occupational diseases and payments in case of death. On the other hand, the health support can be in the form of preventive, curative and rehabilitation medical care or financial support for therapy. These institutions can be grouped in an upper degree as Unions, Federations or Confederations, still considered as mutual associations and therefore also regulated by the Mutual Associations Code.

**Cooperatives** are autonomous collective entities, freely constituted, of variable capital and composition, that through cooperation and self-help among their members, respecting the cooperative principles, aim to fulfil their economics socials or cultural aspirations and needs, without profit. Accordingly to their code, the cooperatives can operate in a wide range of fields, namely consumer, commercialisation, agricultural, credit, housing and building, production, handicraft, fishery, cultural, services, education and social solidarity. They can be grouped in Unions, Federations or Confederations of cooperatives. Since the Cooperative Code allows the distributions of profits among the members of the cooperative, some authors disagree with their inclusion in the third sector. However, they make an exception for the Social Solidarity and the Housing and Building Cooperatives, because they have specific regulations forbidding the distribution of surpluses.

**Non-Governmental Organisations** are private collective entities, without profit aims. The Environmental Non-Governmental Organisations aims to defend and value environment or the natural or build patrimony, as well as to preserve Nature. The Non-Governmental Organisations of Cooperation for Development purposes are the creation, implementation and support of social, cultural, environment, civic and economic projects in the developing countries, through actions of cooperation, humanitarian assistance, emergency help and human rights promotion and protection. Their fields of activity can be teaching, education and culture, scientific and technical

assistance, health, employment and vocational training, preservation of environment, community and social integration, rural development, civil society reinforcement and education for development.

## 1.1 TYPES

The generic term “third sector” comprises a vast diversity of activities and type of organisations, since it includes all the private organisations without profit making. Those organisations have different capacities of mobilising volunteers, linked to an enlarged variety of motivations. Sometimes, the own participation in the activities will be gratifying for the volunteer, namely in cultural, sports, leisure and recreational associations; other times, the participation might fulfil its own interest, as would be the case of self-help, minorities rights defence or syndicate associations. But, most of all, volunteer participations is frequently directed for the service and support of others, being those individuals or the community.

Among Portuguese organisations that involve volunteers, in a less or a higher degree, there are:

- Associations, namely youth, students, women, elderly, families, parents, disabled persons, immigrants, leisure or cultural activities, popular education, occupational, voluntary firemen, consumer’s defence, microcredit, environment, health, social solidarity and social action volunteer associations, many of them with the statute of Private Institutions of Social Solidarity. Some of them have their own juridical framework as, for example, the Immigrants Associations (Law no. 115/99 of 3<sup>rd</sup> August).
- Local Development Associations, which are a relatively recent phenomenon, aiming for the local development of communities and territories in a pro-active and sustainable way, through innovative forms of local intervention. These associations emerged in a large extent on rural areas with the implementation of the European programme Leader and others similar.
- Mutual Associations or Mutual Help Associations, as described above.

- Foundations, which must be public-serving (private interest foundations are not allowed) and must have sufficient endowments to meet their mission prior to receiving their legal status. Social Solidarity Foundations are considered private institutions of social solidarity.
- Brotherhood of Mercy or Holy Houses of Mercy, that are among the oldest not for profit Portuguese associations and have been devoted to the fulfilment of the Mercy Works, mainly through the development of social action and health services.
- Portuguese Caritas, an international Catholic organisation, existing in Portugal since 1945, which is organised at the diocesan level, with some local branches at the parish level and promotes social and charity activities, as well as international humanitarian help. The Diocesan and Parishes Caritas can obtain the statute of Private Institutions of Social Solidarity.
- Parish and Social Centres (*Centros Sociais e Paroquiais*), related to the Catholic Church, and they provide welfare, educational and cultural services, many of them with the statute of private institutions of social solidarity.
- Society of St. Vincent de Paul (*Sociedade de S. Vicente de Paulo*), existing in Portugal since 1859, with a primary function of religious cult and secondary of social assistance and aid, spread all over the country at the level of diocese and parish, some of them with the statute of private institutions of social solidarity.
- Portuguese Red Cross, which is a volunteer led non-governmental humanitarian institution, with the support of the Portuguese Government, and operates in many fields, namely, health and social care, immigrants, refugees and other vulnerable social groups, first aid training and international emergency response. It has its own legal framework and statutes (Law Decree no.281/2007 of 7<sup>th</sup> August 2007).
- Social Solidarity Cooperatives, namely, the Education and Rehabilitation of Disabled Children Cooperatives (*Cooperativas de Educação e Reabilitação de Crianças Inadaptadas – CERCI*), that have been created to overcome the lack of special education and rehabilitation for disabled children.
- NGO of Cooperation for Development and Environmental NGO, as referred before.

- Museums, which are private or public not for profit institutions, legally registered or not, with a permanent character and an organisational structure, that allows the accomplishment of certain activities, namely the acquisition, preservation, research and exhibition of the humanity heritage, for the purposes of education, study and enjoyment.

## 2 RULES AND FUNCTIONING

According to the Statute of the Private Institutions of Social Solidarity, the institutions are free to establish their own statutes, notwithstanding the due respect to the legal norms that apply to them. There are some aspects that have to be mentioned in their statutes, namely the denomination, head-office, aims and activities, social organs (denomination, structure and functions), designating process of members and financial regime. In each institution there will have to be at least two organs, one with managing functions and the other one with supervisory functions, both formed by an uneven number of members, being one designated president. In the institutions with an associative nature, there will always have to be a general assembly of associated members. Generally, decisions will be taken on the base of majority vote, unless it has been legally or statutory defined otherwise, and the president will have casting vote in the case of a tie. The members of the social organs are usually volunteers but, in some cases, if the statutes allow it, they can be remunerated.

The creation of a mutual association requires a constitution act, which must mention its denomination, aims and head-office. The statutes of this kind of association have to include its denomination (always preceded or followed by the expression “mutual association”), aims pursued, head-office and coverage (geographical, occupational, sectoral or corporate), inscription conditions and rights and duties of its members, associative organs (structure, organisation and functions), funding and financial organisation, as well as the electoral regime of the governing organs. Besides the statutes, they will have to have a regulation of the benefits granted to their members. In gen-

eral, the governing organs are formed by a general assembly, a board of directors and a supervisory council and sometimes they can also have a general council. The board of directors and the supervisory council have an uneven number of members and, in each case, one of the members is designated to preside. The social organs can be remunerated, if the statutes permit it.

Depending on the sectoral legislation applicable, the constitution of a cooperative might require a constitution act, which would have to include its denomination, sector of activity, first mandated social organs, identification of all founders and its statutes. The chosen denomination will always be preceded or followed by the expression “cooperative” and will also indicate if they are of limited or unlimited responsibility. The statutes of a cooperative have to contain its denomination, head-office, sector of activity, social organs and capital. Optionally, they can also include other aspects, such as the admission, suspension and exclusion conditions of the cooperative members, the mandate durations and norms of profit distribution, when it’s applicable. Usually, the social organs of a cooperative are the general assembly, the board of directors and the supervisory council, but some can have additional social organs according to their statutes. In all the different kind of cooperative social organs, the designated president will have casting vote.

### 3 RELATIONSHIP WITH PUBLIC SECTOR

#### 3.1 OVERVIEW

In Portugal, the third sector is an important supporter of social politics, but it is strongly dependent on the state and it has a low proportion of volunteers (Delicado A. et al, 2002). While not all the organisations employ volunteers, there is an undoubtedly meaningful level of volunteer participation in most of the organisations, though it may be considered low when comparing to other European countries.

In general terms, the State accepts, supports and values the insti-

tutions’ contribution and work for the effective exercise of social rights, namely in the social welfare field. The contribution of those institutions and the support they get from the state are materialised by cooperation or management agreements, which can include the management of public national or local bodies’ facilities and financial support, namely for building or remodelling facilities, subventions or employment incentives. State support has evolved into contracts forms, by which an established fee is paid by the state for each beneficiary user of the organisation. In any case, since the organisations have a private and independent character, the public support or tutelage cannot limit the institutions’ freedom of action.

Recognising the great effort developed by local public authorities and private not for profit institutions for the resolution of social problems, such as poverty and social exclusion, the government approved the Resolution of the Council of Ministers no.197/97 of 18<sup>th</sup> November 1997, in order to encourage the implementation of local social networks (*Redes Sociais*) all over the country and to grant an equal coverage of social services and facilities. The social network is a forum of articulation and joint effort, with a territorial perspective of intervention, voluntarily constituted by local public bodies and private not for profit institutions, that aims to provide solutions for problems identified in the community and support to the most vulnerable social groups. It encourages the active participation of all the community and local public and private institutions. In general terms, the methodology is a four steps process: social diagnosis, where problems and critical situations are identified; strategic intervention planning; implementation through the partnerships established between the local institutions; final evaluation. These social networks are established at the level of municipalities and parishes.

In order to assure social protection for people not compulsory covered by the general regime, namely the social volunteers, defining them as persons, who willingly and in an organised way, perform an unpaid activity within a private institution of social welfare or an humanitarian association, which includes volunteers firemen, the government instituted an optional contributively social security regime, the Voluntary Social Insurance (Law Decree no.40/89 of 12<sup>th</sup> February

1989). Besides disability, retirement and death, the risks covered by this insurance, in respect of social volunteers, also include occupational illnesses.

### 3.2 FROM OUR POINT OF VIEW (INTERVIEWS AND QUESTIONNAIRES)

#### Interviews

In the opinion of some interviewees, sometimes it looks as if there is a certain mutual distrust between volunteering organisations and the public sector. But, indeed, both need each other. On the one hand, volunteering organisations need the intervention of the state when their resources are not enough to develop the adequate dynamism to provide their self support and sustainability; on the other hand, the state needs strong volunteering organisations to supply social, cultural and others responses complementary to the public policies and to enhance citizenship values. This dichotomy is, in a certain way, reflected in the composition of the National Council, which is mainly composed by ministries representatives and has only a residual number of representatives from volunteering institutions, when it should at least have parity between public and private representatives. So, according to their view, two lines of action can be delineated: Governmental institutions through the National Council and the not for profit institutions through the Portuguese Confederation of Volunteering, which have to work together but autonomously and not in a competitive way but in a complementary way.

#### Questionnaires

The general opinion expressed in questionnaires is that the public sector usually encourages volunteering, but some more support is needed. In 2001, with the celebration of the International Year of Vol-

unteering, there was a great interest in volunteering that seems to have faded a little. So the general feeling is that the state should take more initiatives to promote volunteering, namely supporting its organisation and structure, and demonstrate its utility for the society. Furthermore, networking is very important and to stimulate the network that already exists is an important step to maximise benefits for all the parts involved. Many private organisations cooperate with a great number of public bodies in guiding volunteers, as well as in the development of certain volunteering projects, namely in the creation of Proximity Volunteering Centres. The receptiveness for the integration of volunteers is generally very positive. Indeed, the Private Institutions of Social Solidarity have a wide diversity of volunteering involving projects, but also many public institutions, namely hospitals, integrate a large proportion of volunteers.

Among the volunteering support centres questioned, it is consensual that the opinion of the local structures of volunteering, since they are at the local level, should be taken into account in the definition of politics which regulate volunteering work and define its intervention scope. Only that way, politics could become well adjusted and adequate to the regional and local volunteering reality. In this context, the National Council for the Promotion of Volunteering, as the entity which gives technical support to the local volunteering banks, could have a mediator role between these institutions and the ministries which integrate the Council.

On the other hand, some of the volunteering support centres questioned consider that there is a lack of a representative voice of volunteers, namely integrated in local organisations. So, volunteering needs to organise itself in order to have a representative voice and, consequently, enough strength to influence public policies. Besides, they consider that frequently there isn't enough information of the activities led by some volunteering representative organisations, in part due to a lack of communication between the local and the central level.

## 1 RESEARCH AND STATISTICS HIGHLIGHTS

# VOLUNTEERING ACROSS EUROPE

Several studies on the third sector have been undertaken in the last decade, more particularly after 2001, when the National Commission for the International Year of Volunteering promoted a set of studies about volunteering, one with a global perspective, Characterisation of Volunteering in Portugal, and others dedicated to specific fields, as for example Volunteering in Projects against Poverty and Volunteering and Corporations. The Characterisation of Volunteering in Portugal represents the first complete portrayal ever made on volunteering in Portugal, making a wide characterisation of volunteers and volunteering in the third sector organisations, clarifying its identity and suggesting news lines of action or of future studies.

According to this study, there is a low percentage of volunteering in Portugal compared with other European countries and North America, which is linked to a set of social, economic and political factors that have affected the offer as well as the demand dimensions of volunteering. Depending on the institution considered, the presence of volunteers may be very diverse: Humanitarian Associations of Firemen and Red Cross Delegations are strongly dependent on volunteers whereas private institutions of social solidarity and other similar institutions have lower percentages of volunteers, excepting in the social organs. The smaller institutions, directed to vulnerable social groups and less supported by the state, are the ones that are more dependent on the work of volunteers for the development of their activities. In this context, volunteering might be considered as a temporary labour force to be substituted by employees as soon as the institutions have financial resources to afford it.

The larger part of the inquired institutions considers difficult to recruit new volunteers and when they recruit they preferably use their social network, which on the one hand is discriminatory for some layers of the society and on the other hand avoids investment in formal selection procedures. A great number of volunteers dedicate an average percentage time significantly high to volunteering activities and tend to maintain a close link to the integrating associations for many years. On the other hand, a significant number of institutions make minimum investments namely in training, follow-up and reimbursement of expenses for their volunteers.

There are different profiles of volunteers according mainly to the type of institutions considered. In general, the percentage of young volunteers or in active age, having a profession or studying, married (with or without children) and with a superior national average level of qualification, is more significant. There is a common set of biographic features that might contribute for the explanation of the adhesion to volunteering, namely, among others, a primary favourable socialisation, practice of informal volunteering, political participation, associative experience, religious integration, an occupation directed to the care of others. There are also a great variety of motivations and benefits obtained with volun-

teering, although religious nature motivations and the mention of the well being proportioned by volunteering prevail. This study also mentions the frequent existence of costs and difficulties due to volunteering, variable according to the kind of activity developed.

Later, in 2005, in the scope of the Johns Hopkins Comparative Non-profit Sector Project, a team of researchers at the Portuguese Catholic University in conjunction with the Johns Hopkins Centre for Civil Society Studies presented the first empirical overview of the Por-

tuguese not for profit sector and the first systematic comparison of Portuguese civil society realities to those elsewhere in the world.

This study refers that the characteristics of the not for profit Portuguese sector reflect the long history of the development of the civil society in the country, which has been influenced by four main impulses: the heritage of the Roman Catholic Church; the long tradition of mutualism; the equally long history of authoritarian politic control; the recent transition to democracy that led to a growing relying of the

Table 1 **Type of associations and volunteers**

Type of Associations	Number	% of institution that integrate volunteers	Number of volunteers
Private Institutions of Social Solidarity	3,007	67.7	99,55
Blood Giving Associations	58	95.7	2,794
Portuguese Associations of Parents and Friends of Mentally Disabled Citizens	31	82.4	512
Scouts Associations	20	100.0	12,167
Firemen Associations	471	92.6	38,729
Holy Houses of Brotherhood of Mercy	393	96.6	6,575
Mutuality Associations	78	54.2	455
Foundations	104	57.1	1,582
Local Development Associations	76	58.1	613
Culture, Sports and Recreation Collectivity	2,368	91.1	75,355
Youth Associations	1,099	83.3	75,510
Parish and Social Centres	1,100	80.4	12,650
Caritas	18	100.0	2,178
NGO	91	86.7	21,628
Education and Rehabilitation of Disabled Children Cooperatives	51	82.6	776
Cooperatives	3,191	39.4	9,487
<b>Total</b>	<b>12,156</b>	<b>69.5</b>	<b>360,567</b>

Source: Employment and Vocational Training Observatory, *Study on Volunteering*, 2008.



state on the private not for profit organisations. Although democracy has recently stimulated the development of not for profit institutions in Portugal, their influence has been restricted to a short field of activity, especially in the provision of social services. The study also identifies a certain number of critical challenges that this sector will have to face in the future: to raise the acknowledgement of the society about the sector; to strengthen the legal framework; to improve the capacity of the civil society and, finally, to improve the relationship with the government.

More recently, in 2008, the Employment and Vocational Training Observatory has undertaken a study on volunteering, based on a survey, by solicitation of the National Council for the Promotion of Volunteering, which aimed to characterise volunteering activity in institutions that potentially integrated volunteers. Volunteering of political or syndical nature was not included in this study, as well as religious when restricted to the practice of religious cult or services. An inventory of the different kinds of institutions has been made in order to determine the universe, mainly from administrative records of public institutions or umbrella organisations, totalising more than 12,000 not for profit institutions. Almost 70% of these institutions integrated regular or occasional volunteers, which were estimated to be about 360,000 in total. The proportion of institutions that have integrated volunteers is superior to those who haven't in all type of institutions, excluding cooperatives; in some types, as in Scouts Associations and in Caritas, all the institutions integrated volunteers. Globally, there were about 297,000 employees in those institutions joined together, mostly women (66%). In fact, in all types of institutions, the proportion of female workers was superior, excepting in the Firemen Associations and Cooperatives.

## 2 ECONOMIC AND STATISTICAL INDICATORS

According to the Portuguese Catholic University study, the third

sector is a significant economic strength, since its expenditure in 2002 represented 4.2% of the Gross Domestic Product (GDP). It has almost a quarter of a million full-time workers, of which about 70% are remunerated and the rest are volunteers. Therefore, the not for profit organisations in Portugal employ more people than some industries with some dimension, such as utilities and transportation. The research also refers that the value of the volunteer activity, estimated by the application of an equivalent wage/hour of the health and social action areas to the total amount of volunteering hours, represents more than 0.5% of the GDP.

Recently, the Employment and Vocational Training Observatory presented, in a Forum on Volunteering<sup>4</sup>, an estimation of the economic value of volunteering, calculated on a similar basis through the application of an equivalent occupational wage/ hour to the total amount of volunteering hours by occupations. According to this estimation, the total annual amount of equivalent potential remuneration of volunteers would represent about 0.8% of the GDP.

### 2.1 HUMAN RESOURCES, AREAS OF ACTIVITY

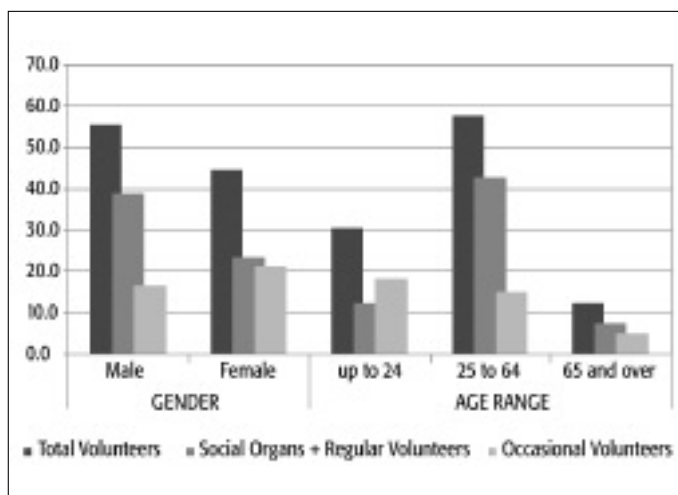
The research carried out by the Catholic University estimated that there were more than 227,000 full-time equivalent workers in the not for profit sector, corresponding to 4.2% of the Portuguese labour force, which is inferior of the 4.5% average for the 38 countries on which there available data and it is significantly below the Western Europe countries average. However, the not for profit working people is in dimension similar to the one existing in Spain or Italy and superior if compared to the transitions countries of the Eastern and Central Europe. Nonetheless, the percentage of volunteers in the Portuguese civil society organisations is lower than in most of the developed countries.

A considerable proportion of the working force of the third sector is in the service sector (60%), which is very similar to the situation

<sup>4</sup>Forum Volunteering as an Agent of Development, held in November 2008 and promoted by the National Council for the Promotion of Volunteering.

in most of the countries. Nevertheless, a bigger proportion is concentrated in social services (48%) and a lesser proportion in the health and educational services (10%), when comparing with the international situation. Furthermore, a substantial proportion is involved in expression activities (25%), such as culture, recreation, professional and civic participation.

Table 2 Characterisation of volunteers

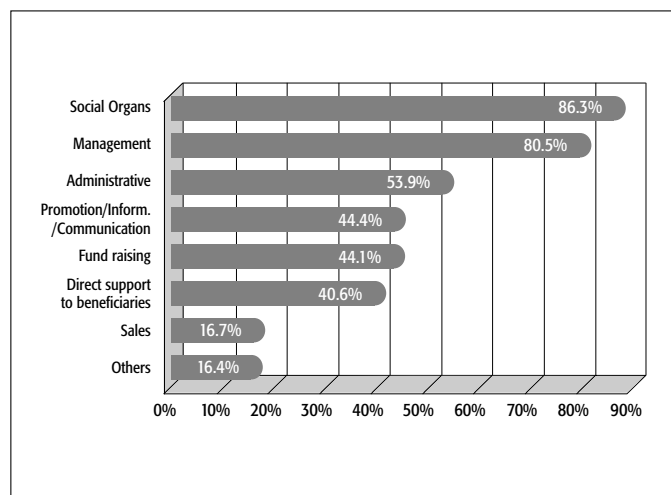


Source: Employment and Vocational Training Observatory, *Study on Volunteering*, 2008.

According to the study undertaken by the Employment and Vocational Training Observatory, in the universe of institutions that potentially integrated volunteers, there were about 297,000 employees, mostly women (66%) and 360,000 volunteers, mostly men (55%). In respect of the age range, adults between 25 to 64 years old accounted for the largest share of volunteers (58%), followed by young people up to 24 years old (30%). Almost 63% of the volunteers were in the social organs of the institution or performed regularly a volunteering activity, while 37% only occasionally participated in volunteering activities. Occasional volunteers are mostly under 25 years old (48%) and women (56%).

More than 80% of the volunteering integrating institutions reported having volunteers participating in the social organs or developing management activities within the institution, which reflects the fact that, in Portugal, in many organisations the only existing volunteers are at the level of the social organs. Administrative work, promo-

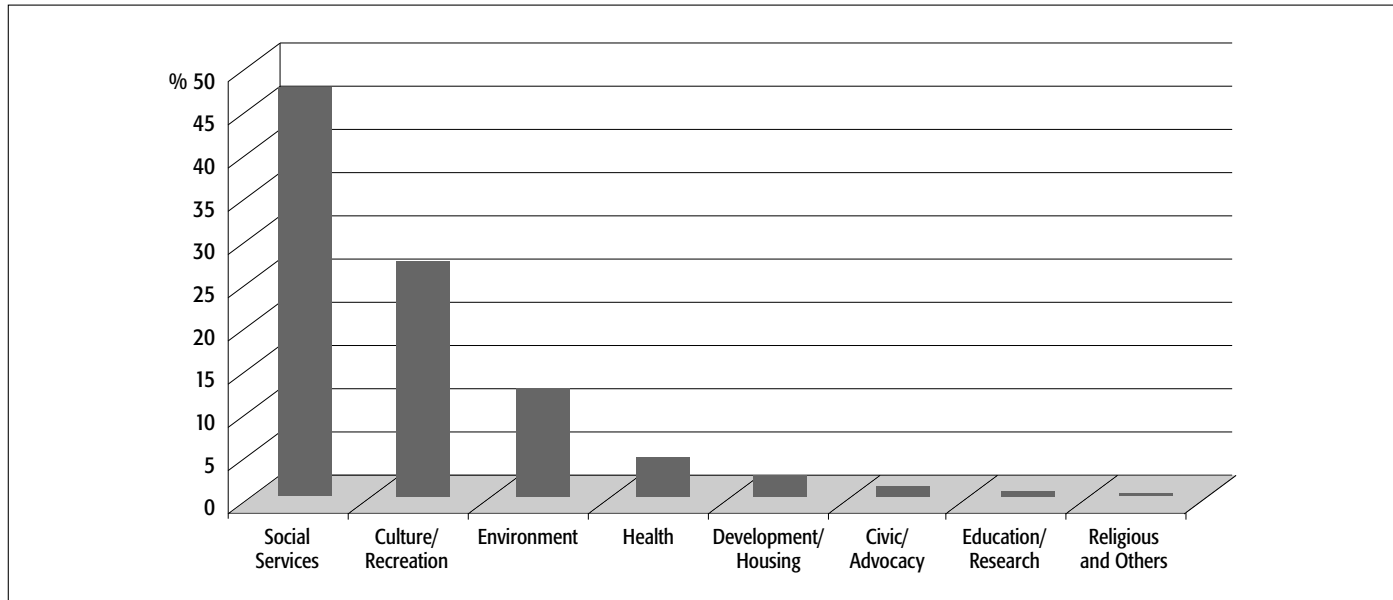
Table 3 Percentage of institutions with activities developed by volunteers



Source: Employment and Vocational Training Observatory, *Study on Volunteering*, 2008.

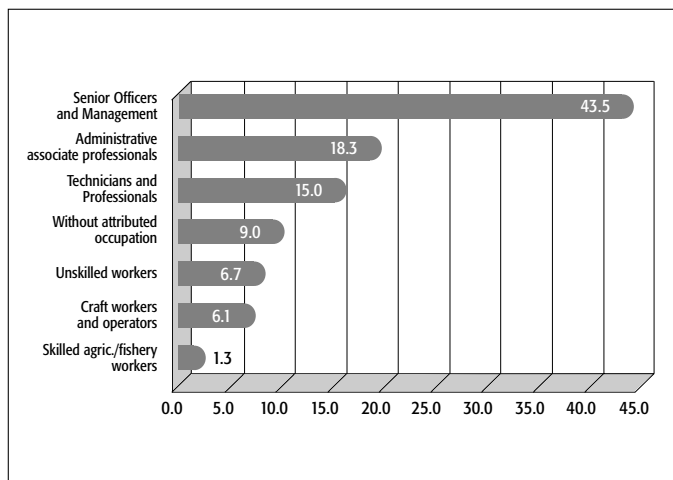
tional, informational and communicational activities and fund raising are the following task developed by volunteers mainly mentioned by institutions. In 40% of the volunteering integrating institutions, volunteers give direct support to beneficiaries and in almost 17% they perform tasks related with institutions' product sales.

Table 4 Distribution of volunteers by main sector of activity of the institution



Source: Employment and Vocational Training Observatory, *Study on Volunteering*, 2008.

Table 5 Distribution of volunteers (social organs and regular) by main occupation



Source: Employment and Vocational Training Observatory, *Study on Volunteering*, 2008.

There is a greater concentration of volunteers in the social services (48%) and in the culture and recreation fields (28%) rather than in civic and advocacy areas (1.7%) or education and research (less than 1%). In the middle are the areas of environment (13.2%), health (5.1%) and development and housing (3%). According to their main occupation, volunteers are concentrated in the first three main groups of occupations: senior officers and managers; administrative associate professionals; technicians and professionals.

On average, each social organ or regular volunteer spent 210 hours per year engaged in volunteering activities, whereas occasional volunteers spent almost 18 hours per year. Above the average are the regular volunteers in Firemen Associations and Scouts Associations, which spent 328 hours and 233 hours, respectively. On the opposite are the regular volunteers in the Blood Giving Associations and Cooperatives with average annual hours lower than 80.

Table 6 Average annual hours of volunteering by type of institution

Type of Associations	Volunteers	
	social organs + regular	occasional
Firemen Associations	328,4	84,3
Scouts Associations	232,6	18,1
Education and Rehabilitation of Disabled Children Cooperatives	211,0	87,7
NGO	198,9	38,2
Private Institutions of Social Solidarity	193,9	20,7
Parish and Social Centres	193,2	17,9
Culture, Sports and Recreation Collectivity	187,2	20,5
Holy Houses of Brotherhood of Mercy	178,4	33,6
Foundations	162,3	55,6
Caritas	147,2	10,1
Portuguese Associations of Parents and Friends of Mentally Disabled Citizens	109,6	50,3
Youth Associations	97,7	10,2
Local Development Associations	89,6	26,2
Mutuality Associations	89,4	0,0
Cooperatives	75,7	0,0
Blood Giving Associations	73,3	7,9
<b>Total</b>	<b>210,0</b>	<b>17,6</b>

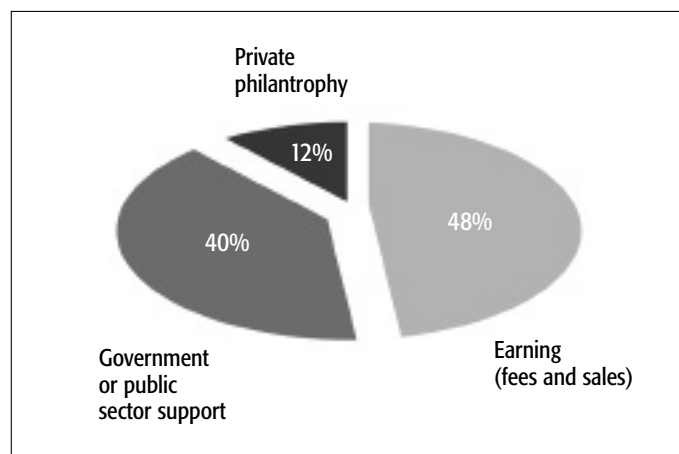
Source: Employment and Vocational Training Observatory, *Study on Volunteering*, 2008.

In respect to occasional volunteers, it is in Cooperatives for Education and Rehabilitation of Disabled Children and in Firemen Associations that volunteers spend more hours than the average engaged in volunteering activities, whilst in the Blood Giving Associations and in Caritas they spend lesser than the average.

## 2.2 FUNDING

The study of the Portuguese Catholic University analysed the revenue of the civil society organisations, having grouped it in three categories: earned income (or fees), which includes private payments for goods or services, dues and investment income; private philanthropy, which includes individual, foundation and corporate giving; government or public sector support, which includes grants, contracts, reimbursements for services to eligible third parties and payments from government-financed social security systems that operate as quasi-nongovernmental organisations.

Table 7 Forms of funding of civil society in Portugal



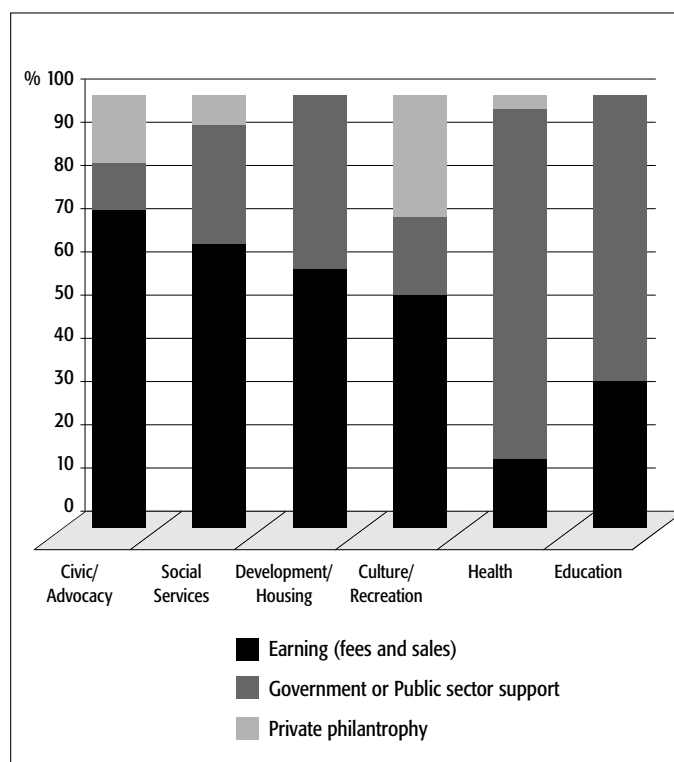
Source: Franco R.C., *Defining the Non-Profit Sector: Portugal*, 2005.

One of the main findings is that sensibly half of the not for profit Portuguese organisations' revenue (48%) comes from service fees

and sales, followed by public sector funding (40%). This significant amount of public sector funding is explained by the government's reliance on not for profit organisations for the provision of social services and by public-sector support to the existing private health and education institutions. Philanthropy represents only 12% of the revenue but, if volunteering is included, considering it as a form of philanthropy, this percentage raises to 21%, though still well below fees (44%) and public funds (36%).

Comparing with other countries, Portuguese civil society organisations have more access to government support than their equivalent organisations in the transitional countries of Central and Eastern Europe, but less access than in developed countries and, as a way of compensation, they must strongly rely on fees and sales.

Table 8 Forms of funding of civil society in Portugal



Source: Franco R.C., *Defining the Non-Profit Sector: Portugal*, 2005.

By field of activity, in health and education, government funding is the dominating pattern, whereas in the remaining areas with available data, namely, civic and advocacy, social services, development and housing, culture and recreation, fees and sales are the dominating patterns.

### **3 OF VOLUNTEERS AND ORGANISATIONS (INTERVIEWS)**

#### **3.1 MOTIVATIONS AND BARRIERS**

Having a very clear social conscience and being aware that the construction of the society, in a wide sense, is the responsibility of everyone, constitutes a very strong motivation. Indeed, the feeling that everyone is a co-operator of the society must be valued. This kind of motivation doesn't emerge suddenly; it is transmitted through education and experience within family life, for example. The distribution of responsibilities within families, where everyone has to help with some work for the family wellbeing, can contribute for the development of this kind of social awareness. Schools should do it too, but nowadays they are rather spaces of competitiveness than spaces of solidarity and the great adversary of gratuity is competitiveness: in competitiveness, one must do everything to obtain some material gain or one's own success. Teachers at school sometimes try to give some civic education to students and to involve them in solidarity projects, but those are punctual activities that most of the times remain at the conceptual level. One of the possible ways to fight against this society of anonymity and to create social relationships is through the implementation of solidarity and volunteering mechanisms. In brief, the most fundamental motivation is a great sense of the other, of solidarity and the relationship established with society.

Religion is a traditional motivation. There are many religious confessions that have volunteers working in religious, social or cultural activities. Here some caution is needed especially if the dedication to a cause has the objective to proselytise. In the XIX century, some other motivations appeared which might be called civic motivations, related

in particular with trade unionism, corporations and mutualism. This was due to a strong social conscience, the real citizenship, also linked in a certain way to militancy or integrating a political component. Another significant motivation is the cultural or recreational scope. Curiously, when the movements of the 19<sup>th</sup> century emerged, those cultural and recreation organisations were included in that group. There are also more specific motivations related with environment, health or disadvantaged social groups. They have certain autonomy from the traditional motivations, but frequently they mix together.

Other motivations are related to status. Some corporations have effectively a volunteering culture and genuine preoccupations of social responsibility, but some others develop actions in the social field in order not to be connected with the neo liberal ideology and to obtain a certain status in the society.

Another motivation is to do something to occupy available time. It is in a certain way a self interested motivation, but useful for the community. It happens mostly with early retired persons, who were used to be occupied all day and suddenly have too much spare time for them when they get retired. They have the expectation of having an occupation that in some way is a continuity of their professional life. To overcome their own loneliness by doing some volunteering work is another kind of motivation.

Then, there are some motivations which are not entirely free of interest: for example, some students who work as volunteers just to put it later on their CV or to access or create a contact network that might help them to get a job when they will have their diploma. And there are also not very honourable motivations: some people offer to work as volunteers to get some kind of advantages, as for example a free monthly transport title. Some people with economic difficulties look for voluntary activities just to grant a meal for the day.

There is a last motivation which might be called not expressed or tacit: some people are volunteers just because they are, they feel an impulse to be volunteers not rationalising about it and most of the times they are excellent volunteers.

Motivations can be very diverse but if there isn't some kind of identification with the project or the volunteering organisation, it

might be very difficult for the volunteer to feel part of it. Personal motivations will influence the volunteers' expectations and satisfaction, as well as their performance. It is fundamental for the success of volunteers' management to understand and develop their expectations until the attainment of a balance level between will and utility for the institutions.

Some people do not volunteer because they haven't the referred sense of the other, instead they are self-centred. An egocentric cannot perceive the sense of gratuity and, if eventually he'll be doing some volunteer activity, almost certainly it would be to obtain some gain or personal interest. The sustainability of this kind of volunteer is very fragile because at the minimum contrariety, he'll be gone.

Even the organisation of society is based on a concept of wellbeing or happiness rooted in material values and goods. People establish as a priority to obtain this material goods and it absorb all their time, leaving no space or time for volunteering. Their professional life and working life is so full that they can't dispose any extra time to do volunteer work. Others are in poor health, psychological or physical, and cannot compromise to do volunteer work. Some people simply don't know where to go to volunteer or to obtain information about volunteering.

The difficulty to assume and especially to maintain a regular commitment is another obstacle to volunteering. The efforts developed in increasing the faithfulness of volunteering are very significant. To be a volunteer involves motivation, training, commitment and responsibility and people have to be aware of that.

Since people that do volunteering work do not expect to receive any material compensation in its return, some society sectors tend to undervalue their capacities. Besides, some consider that there is a certain risk in being a volunteer, linked with some insecurity or fear of not being able to do or to enjoy some kind of work or yet to not get along with the co-workers. For some people with large and long experience, sometimes it might be uncomfortable to work as volunteer under the direction of younger people. Frequently, it isn't easy for both parts, since on the other side, some people are afraid that volunteering might take their activity over. Relationships in the volunteer-

ing involving organisations must be carefully managed, the integration of volunteers has to be well prepared and the role of both, volunteers and employees, must be clearly defined.

### 3.2 NEEDS AND CHALLENGES

In respect to the volunteering promoting organisations, the most helpful support would be to encourage, through a close cooperation between the CPV and the CNPV, the development of volunteering organisations where volunteers will predominate and give them technical support.

Secondly, it should be given support for the integration of volunteers in organisations whatever kind they are (volunteering promoting organisations, not for profit private institutions in general not only of social solidarity and organisations of volunteers). The organisations should have someone totally available to accompany the volunteer throughout its integration process, but sometimes they haven't. So, the creation of tutors or group of tutors within the organisation that accompany volunteers throughout their integration process is essential. This integration process is fundamental for the management of expectations from the volunteer and the organisation. Support in managing relationships between volunteers and employees is also needed.

Thirdly, training support should be provided since organisations have also some needs and difficulties at the level of training actions for volunteers. Here again, the management of expectations is important, considering that some volunteers might not be totally receptive to training actions. Those training actions have to be well planned and some organisations need help at this level too. The definition of a basic training methodology for volunteer, assumed and recognised by all, is essential. It would allow the harmonisation of concepts and of initial training, which could then be completed with specific training in the area of activity where the volunteers are going to be integrated.

Lastly a better knowledge of volunteers and of the problems they help to solve or their potential to solve other problems should be en-

couraged. Indeed, volunteering involving organisations need support in the definition of their intervention fields. Sometimes, they are not very creative in the diversification of the voluntary activities they can offer or perform. Maybe, it should be done a study on the potential activities that a volunteer might perform or volunteering involving organisations might develop in a variety of volunteering domains. For example, there aren't many volunteers doing administrative work.

In one of the interviewees' perspective, it is not necessary to cre-

ate heavy structures, which frequently happens in a context where the monetary vision prevails, but instead use extensively the capacities of volunteers' organisations and volunteers and employ occupational workers only when those volunteers and their organisations find it necessary. It doesn't make sense to create paid jobs to support volunteers, so the logic must be to create a volunteering dynamic which might need at some point, and probably will, remunerated professional workers.



# Representation and coordination bodies

A distinction that might be made is between organisations with a broader and transversal range of intervention, like the National Council for the Promotion of Volunteering and the Portuguese Confederation of Volunteering, and organisations with a more specific field of intervention, namely related with the type of institutions they are, as for example the National Confederation of Solidarity Institutions, the Union of the Portuguese Mutualities or the Union of the Portuguese Holy Houses of Mercy. Besides those one, there are also many other umbrella institutions linked to the organisations activity, as for instance, support to the mentally disabled, food bank against hunger, scout movement or education and rehabilitation of disabled children. A consequence is that representation, support and coordination of volunteering may overlap at different levels, since many associations may belong to or be represented in more than one umbrella organisations. A brief presentation will be made of the first two distinct type of organisations referred above.

## **1 PUBLIC ENTITIES**

### **1.1 NATIONAL COUNCIL FOR THE PROMOTION OF VOLUNTEERING**

The National Council for the Promotion of Volunteering (*Conselho Nacional para a Promoção do Voluntariado*) is a public entity, presided by a person nominated by the Social Solidarity and Labour Ministry and formed by advisers, who represent several ministries and local public bodies, as well as the Regional Governments of Azores and Madeira, and by representatives of the National Confederation of Solidarity Institutions, Union of Portuguese Houses of Mercy, Union of Portuguese Mutualities and of the Portuguese Red Cross. It also integrates representatives of other associations that have an intervention directly related with the domains of volunteering identified in the framework law. The National Council is responsible for the promotion, qualification, research and organisation of volunteering and is a consultancy organ to the Minister of Labour and Social Solidarity in all the matters related to volunteering.

## **2 CONFEDERATIONS**

### **2.1 PORTUGUESE CONFEDERATION OF VOLUNTEERING**

The Portuguese Confederation of Volunteering (*Confederação Portuguesa do Voluntariado*) was created in 2007 with the aim to represent the Portuguese volunteers and their organisations, of any domain of activity and to con-

tribute for the defence of their rights and interests. In order to fulfil its purposes, the confederation has a wide range of activities, namely, preservation of the volunteers' identity, cooperation with the federate organisations in the creation, development and qualification of volunteers involving organisations, qualification of volunteers and their work, support to the integration of volunteers in the organisations, promotion of cooperation between volunteer involving organisations and between them and other entities, encouragement and intensification of the role of volunteering in the Portuguese society, promotion of studies and research about volunteering and periodical evaluations of the volunteering role and situation in Portugal.

## 2.2 NATIONAL CONFEDERATION OF SOLIDARITY INSTITUTIONS

In 1981, a group of private institutions of social solidarity decided to create a Union, in order to promote a better knowledge of the social reality in Portugal, the exchange of experiences and the improvement of social services provided to the communities. Twenty-two years later the Union became the National Confederation of Solidarity Institutions (*Confederação Nacional das Instituições de Solidariedade*) aggregating 20 district Unions and more than 2,500 private institutions of social solidarity, spread all over Portugal, including the Autonomous Regions of Azores and Madeira. Its main purposes are to represent, defend and promote the private institution common values of social solidarity, to coordinate the cooperation between its affiliated institutions and between them and other private or public organisations, as well as to contribute for the reinforcement of their intervening role amongst the community.

## 2.3 PORTUGUESE CONFEDERATION OF THE CULTURE, SPORT AND RECREATION COLLECTIVITIES

The Portuguese Confederation of the Culture, Sport and Recreation Collectivities (*Confederação Portuguesa das Colectividades de*

*Cultura, Desporto e Recreio*) was created in 1924, initially as a federation, transformed in a confederation in 2003, with a decentralised two level structure: municipal collectivity associations and district collectivity federations. The confederation represents more than 3,800 collectivities of popular root association, which develop activities in the fields of culture, recreation and sport. Amongst its aims are the strengthening of the associative movement in order to value and recognise its importance, definition of common interest projects and concerted actions, as well as the creation of supporting structures, if needed, to realise those projects, and the promotion of training actions, seminars, meetings and national congresses.

## 2.4 PORTUGUESE FIREMEN LEAGUE

The Portuguese Firemen League (*Liga Portuguesa dos bombeiros*), founded in 1930, is the national confederation of all the firemen associations (humanitarian firemen associations or federations and others public or private firemen organisations), representing 473 associations from all the country and 20 district federations. The league is the interlocutor organ between the public authorities and the firemen associations. In general terms, its aims are to represent and defend its members' interests, to actively participate in the definition of national politics in the field of civil protection and population emergency help and to develop supporting actions in the domains of training, information and resource management for its associates. The league is also responsible for the management of the firemen social protection fund, which is a complementary social protection fund for firemen and their families.

## 2.5 UNION OF THE PORTUGUESE MUTUALITIES

The Portuguese Mutualities Union (*União das Mutualidades Portuguesas*), constituted in 1980, is the umbrella organisation that represents the interests of about 100 mutual associations, which all to-

gether have almost 1000 associates. It promotes the organisation, defence, development, culture and practices of the mutual solidarity, in order to diffuse the mutualism movement in the context of the social economy, defining its strategic directions and guidelines.

## 2.6 UNION OF THE PORTUGUESE HOLY HOUSES OF MERCY

Created in 1976, the Union of the Portuguese Houses of Mercy (*União das Misericórdias Portuguesas*) is a canonical association, which aims to guide, coordinate and represent the Portuguese Holy Houses or Brotherhood of Mercy, through the defence of their common interests, the organisation of their services according to their commitments and the promotion of the principles that form their Christian basis origin and determine the solidarity spirit of their action. The development of the union's mission is focused in the support to its 400 affiliated associations and to their priorities and actions in the fields of old age, health, youth, childhood, poverty and culture and patrimony preservation. At the international level, the union is part of the European Union Houses of Mercy and the International Confederation of Houses of Mercy and it also gives support to the foundation and recuperation of Holy Houses of Mercy in the Portuguese official language speaking countries and in the Portuguese emigrants' communities.

## 2.7 PORTUGUESE CENTRE OF FOUNDATIONS

The Portuguese Centre of Foundations (*Centro Português de Fundações*) is an association created in 1993, from the initiative of three foundations: the Eng. António de Almeida Foundation, the Calouste Gulbenkian Foundation and the Oriente Foundation. It was born to fulfil the will and the need of having a representative institution capable of defending the foundations interests and of organising them. The aim of the Portuguese Centre of Foundations is to establish the cooperation and solidarity amongst its members, within the non personal interest activities they undertake in the third sector. Ac-

tually, it has more than 100 affiliated foundations. It also assures an international representation, maintaining contacts with international foundations associations.

## 2.8 PORTUGUESE PLATFORM OF DEVELOPMENT NGOS

Constituted in 1985 by a group of 13 diverse non-governmental organisations having in common the will to develop projects of cooperation, the Portuguese Platform of Development NGOs (*Plataforma Portuguesa das Organizações não Governamentais de Cooperação para o Desenvolvimento*) aimed to be a link between the NGO, the civil society, the public authorities and other institutions, namely, the Portuguese Institute of Development Support and the European NGO Confederation for Relief and Development. The number of NGO it represented grew trough the years and nowadays it integrates 54 NGO. Among its aims are the promotion of sustainable and integrated development models that respect the human rights; the participation in the definition and implementation of national and international development and cooperation politics; the proposal, encouragement and defence of economical, commercial and financial measures that respect the populations' interest of the northern and southern countries; the sensitisation of public opinion and governments for the urgency of promoting an equitable and participative development at the local, national, regional and global level; the promotion of reflection and debate among NGO about specific themes and geographical or technical areas in the development and cooperation context.

## 3 NETWORKING (INTERVIEWS)

According to the interviewees, cooperation between organisations of the third sector is growing intensively. It has started rising mainly after the creation of the CNVP and it is now increasing with the formation of the CVP. Networking is an apprenticeship that is learned

by doing. However, if there is a surcharge of work, it might discredit the potentialities of networking. There has to be equilibrium between work that has effectively to be done in networking and work that doesn't need to be done this way.

There is a traditional articulation between a great number of the organisations and public institutions mostly in the social security domain but also in others, such as the cultural, health and environmental. It's a close cooperation that sometimes is problematic because it implies a strong financial dependence of the third sector relatively to the State and the Social Security.

However, not all the volunteering involving organisations are keen on networking, because sometimes they feel reduced. One example is the social networks. They were supposed to be informal networks of participation, where all the organisations would stand on the same level, but in practice there are different levels of participation ac-

ording to organisations' power which is determined by the number of votes or the resources they can provide. In this context, some organisations are disinvesting of those networks, especially if they are organisations of volunteers only. So, there are many networks operating but their efficacy is dubious and, frequently, it seems that some of them exist only to exchange information and that they don't work in effective cooperation. Even the circulation of information takes too much time when it should be more fluid to improve the efficiency of intervention. To sum up, networking is needed and is undoubtedly an added value but, in order to function normally, it requires that all the entities involved have the same statute.

It can also be noted a greater commitment of private enterprises in fomenting volunteering within their social responsibility. It is expanding considerably owing to the existence of a strong social conscience in this area and a great cooperation potential.

## Support bodies

### 1 VOLUNTEER SUPPORT CENTRES

In 2001, the National Commission for the International Year of Volunteering gave new impulse for the promotion and diffusion of volunteering at a national level and since then a growing interest for volunteer activities has broadened, also encouraged by the public recognition of its importance. In this context, new forms of volunteering promotion and sensitization were developed; however, some issues remained linked mostly to the match between the offer and demand of volunteer opportunities. In order to solve these issues a new project was launched: the creation of local structures that would enhance the efficiency of volunteering at a local level, by benefiting from the proximity and the knowledge of the regional or local characteristics. The National Council for the Promotion of Volunteering, responsible for the organisation and qualification of volunteering, defined, in its activities' programme, the expansion of volunteering as one of the strategic priorities, through technical support for the creation of Local Volunteering Banks. This technical support would include providing information of various kinds; promoting the articulation between different initiatives; technical following up of volunteering banks; creating a network of information between them; distributing informative and training support materials edited by the National Council. Additionally, one of the aims of the 2003/2005 National Action Plan for Inclusion was to create 50 Local Volunteering Banks, preferably in partnership with local public bodies.

As a consequence, in many localities, some programmes and volunteering banks emerged, mainly with the support of public entities (city councils), several in direct articulation with the Social Network (*Rede Social*) and others by initiative of third sector organisations. In May 2004, the National Council for the Promotion of Volunteering, in cooperation with the Citizenship Social Protection Department of the Social Security Institute, published a guidebook for the creation of Local Volunteering Banks, in order to establish ho-

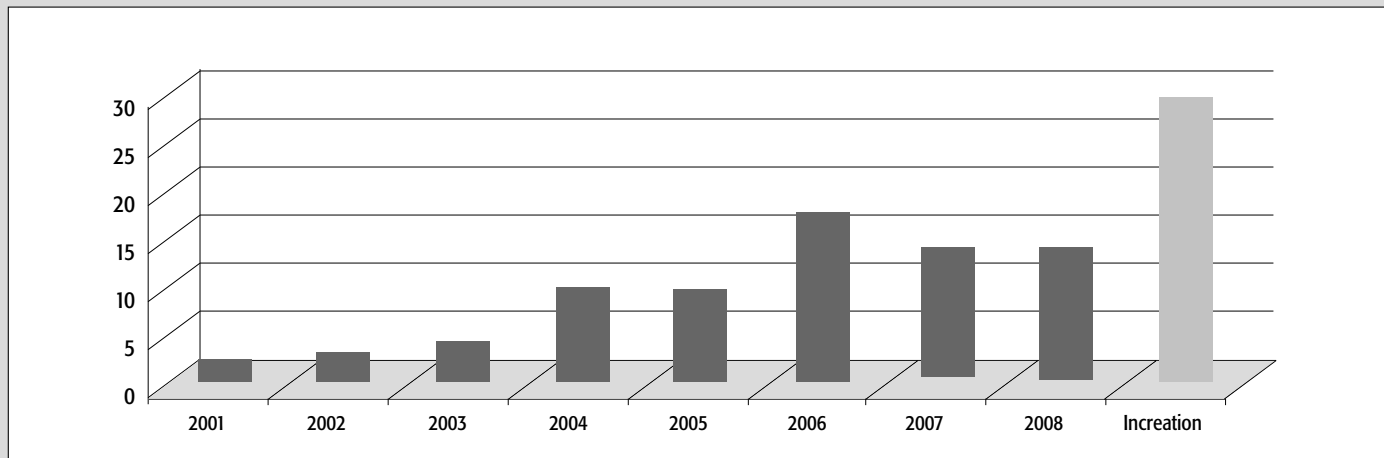
mogenised implementation and functioning proceedings, as well as to launch the basis for an articulated information network that would allow the collection of comparable statistical data.

#### 1.1 THE LOCAL APPROACH: VOLUNTEERING BANKS

The general aims of a Local Volunteering Bank, as referred in the guidebook, are to promote the match between offer and demand of volunteering; to sensitise citizens and organisations for the importance of volunteering; to publicise projects and opportunities of volunteering and to contribute for the research in volunteering. The guidebook refers to the intervention of three kinds of agents in those banks: the volunteers, the volunteering promoting organisations and the local bank implementing institutions. The implementing institutions are collective persons of public or private nature, socially recognised, generally a city council, which uses its own resources (funds and human) for the creation and implementation of a Local Volunteering Bank. Some institutions can accumulate the role of promoting organisation with the role of implementing organisation, if they have an adequate structure.

Besides the register of candidates and organisations and the exchange of information between both, the local bank can also provide training actions, create and manage a documentation centre and a website, as well as use and diffuse the informative materials edited by the National Council. It is required that they maintain a qualitative and quantitative structure of human resource adequate for the development of their activities. For the registration of volunteers and organisations, the guidebook suggests two separated models that will originate two different databases. After crossing the registered information and matching the offer and demand according to the profile of the candidate and the project of the organisation, the guidebook recommends the realisation of a tripartite reunion, involving the volunteer,

Table 9 Local Volunteering Banks by year of creation



Source: National Council for the Promotion of Volunteering, Online List of Local Volunteering Banks, Situation at November 2008.

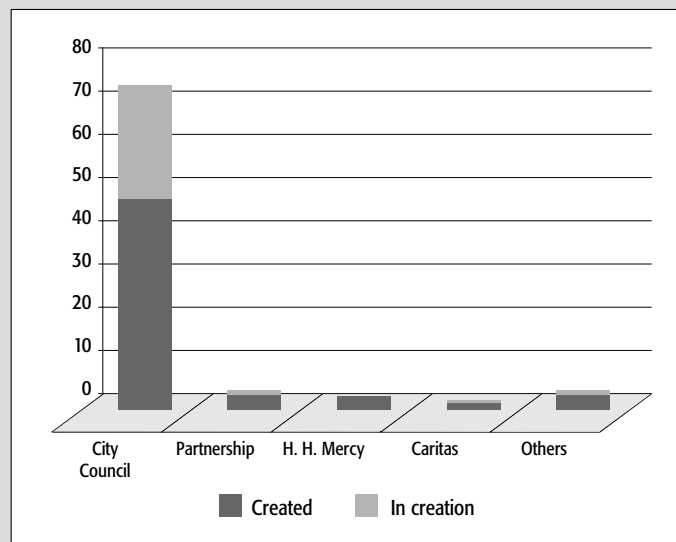
the promoting organisation and the bank, where all the aspects related to the volunteering project should be discussed, namely rights and duties, insurance, volunteering programme<sup>5</sup> and training<sup>6</sup>. If an agreement is reached and the volunteer is integrated in the organisation, after a certain period of time, a general evaluation should be made, covering the volunteer work developed and the degree of satisfaction of both parts.

A brief characterisation of the Local Volunteering Banks can be made, based on the online list of Local Volunteering Banks, available in the National Council for the Promotion of Volunteering website.

According to that list, in November 2008, 62 Local Volunteering Banks were already created and 28 were in the implementation phase. The graph above shows that 2006 is the year that has registered, until now, the bigger number of local banks created in only one year.

Most of the Local Volunteering Banks have been created by the

Table 10 Local Volunteering Banks by implementing institutions



Source: National Council for the Promotion of Volunteering, Online List of Local Volunteering Banks, Situation at November 2008.

<sup>5</sup>A model of a volunteering programme/agreement is also available in the guidebook.

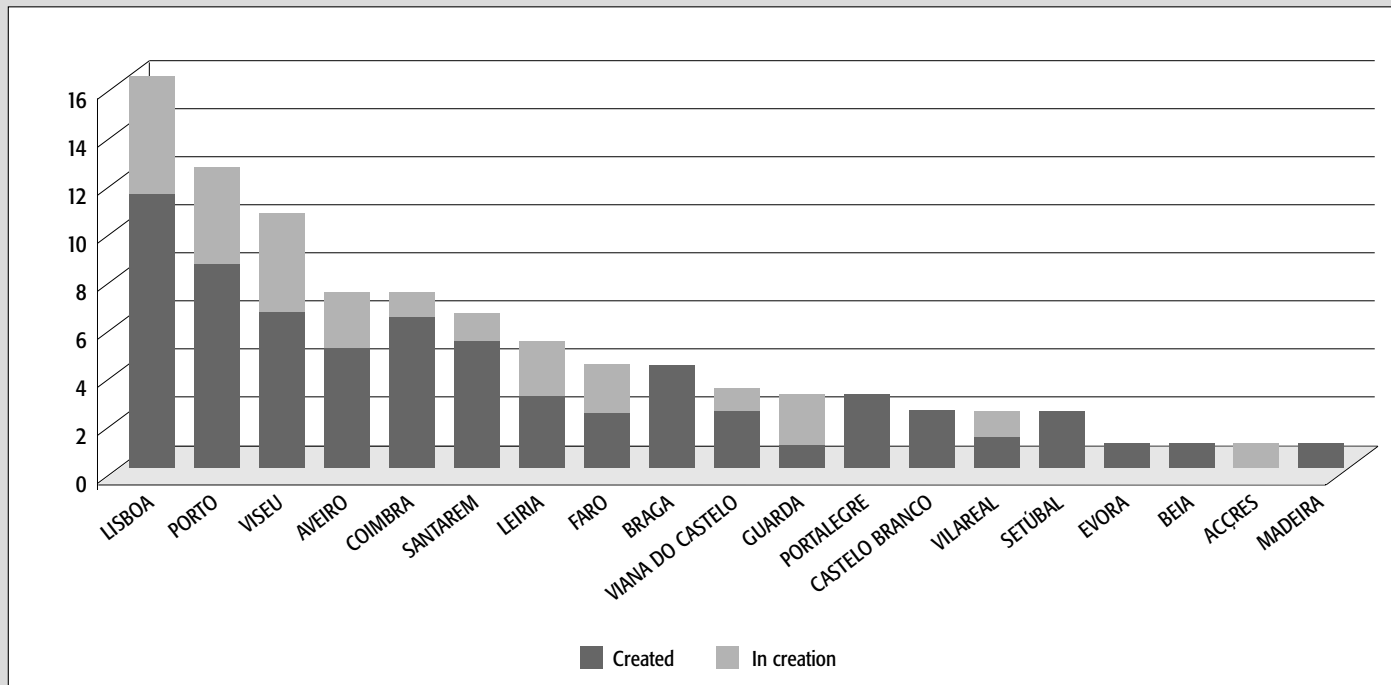
<sup>6</sup>In 2003, the National Council for the Promotion of Volunteering organised a training manual, with the cooperation of other entities, called Volunteering Training: Trainer's Manual, which can be used as a basic instrument for the training actions.

City Council (almost 83% of the total, if we include the ones that are going to be created) and of the remaining banks, 5 were created in partnership with the City Council, 3 were implemented by Holy Houses of Mercy, 2 by Caritas and the other 5 by one foundation and associations.

With the future implementation of the Local Volunteering Bank in the Autonomous Region of Azores, all the Portuguese territory will

be covered, at least at the level of the districts and autonomous regions. Lisbon is the region with a higher number of Local Volunteering Banks (16, of which 5 are being implemented), followed by Porto (12, of which 4 in implementation phase). In the third position, emerges the District of Viseu with 10 banks, 6 of which are still to be created. Considering only the banks already created, than it is the District of Coimbra that is in the third position with 6 created banks.

Table 11 Local Volunteering Banks by district and autonomous regions



Source: National Council for the Promotion of Volunteering, Online List of Local Volunteering Banks, Situation at November 2008.

# Focus on support bodies

## (Questionnaires)

### 1 INTRODUCTION

Among the 62 Local Volunteering Banks that existed in November 2008, the questionnaire was distributed to five of them, all created before 2007 and chosen in order to grant geographical representation and diversity at the level of the organisation which has created them.

Two of the Local Volunteering Banks chosen were created by the local city council, the Local Volunteering Bank of Figueira da Foz and of Lisbon. The other three Local Volunteering Banks, the Diocesan Caritas of Beja, Holy House of Mercy of Santo Tirso and the Eugenio de Almeida Foundation, were created by volunteering involving organisations. Besides those five Local Volunteering Banks, the questionnaire was also distributed to another institution, Entrajuda, which has a larger geographical coverage.

### 2 LEGAL STATUS, ORGANISATIONAL STRUCTURE AND FINANCIAL RESOURCES

As referred, two of the Local Volunteering Banks questioned were created on the dependence of the City Council Department of Social Actions, whereas most of the others are not for profit private institutions of social solidarity, excepting one, which is a foundation. Only two of them are membership-based organisations, the Holy house of Mercy of Santo Tirso and Entrajuda.

In respect to the organisational structure of these organisations, and excluding the two created by the city council which are integrated in public bodies, all of them have a board of directors made up of 3 to 8 members, mostly males (70%) and aged 31 to 64 (82%), all volunteers, and they all have a chairman, in the age range of 31 to 64,

mostly volunteers. Additionally, two of those organisations also have a general assembly and an executive committee.

All the organisations have head-offices, four being property of the own organisations and two given in free-loan, one by a public body and the other one by the Diocese. Most of them work five days a week all year round, 4 to 7 hour a day and one of them is open all days all through the year, 9 hours a day. Half of them have branch offices or local structures.

Regarding to the financial resources, the two local centres created by the respective city councils are totally financed by the public local government. Of the other four, in three of them a significant percentage of funds comes from the public national or regional government (from 11% to 75%, depending on the organisation) and from services charged (from 21% to 89%). The funding sources of the remaining organisation come mainly from corporate funding, EU projects or subventions, private donations and international agencies or foundations.

### 3 TERRITORIAL RANGE AND HUMAN RESOURCES

As regards to the territorial range, in three cases the organisations operate in the municipality level, and for the other three, one operates at the national level, another at the district level and the last one at the interprovincial level.

All the organisations have full-time paid staff for everyday activities, working most of them in other activities rather than volunteer support and development (in organisations which have other activities besides the local volunteer bank, naturally). All but one of the organisations involve volunteers for everyday activities and their average hourly commitment per week goes from 2 to 10 hours.



#### 4 ACTIVITIES CARRIED OUT BY THE ORGANISATIONS

In the years 2005–2007, the volume of activities and services provided by the organisations questioned has increased considerably in four of them and two of them declared a slight increase. The activities that registered a considerable grow in demand were: training courses, promotion and events, publications, management consultation and assistance, technology assistance and communication. In respect to services that were frequently requested but which they didn't provide, organisations referred mostly training trainers, long distance training, fundraising activities, technical support to similar structures and European Voluntary Service.

The promotion of the volunteer support centre services is mostly made on the website, by direct mail, in meetings with target organisations, in events and by leaflets and similar. Three of the organisations referred to pursue some activities, projects or targeted policies with regards to involving specific target groups in voluntary activities, namely youth, elderly and visitors group. Only two of the organisations require a formal agreement between the volunteer support cen-

tre and the organisations service users. In one case, it is a tripartite cooperation agreement involving the Local Volunteering Bank, the promoting organisation and the volunteer, and in the other case it is a juridical contract. None of the organisations require payment for volunteer support centre services supplied.

Three of the organisations were members of the local or regional social network of their municipality or district and two were members of the local commission of protection of children and youth. Only two of the organisations questioned had participated in the years 2005–2007 in EU funded projects, namely in research area and in exchange of good practices and one of the projects involved another European country (Spain). As regard to the aim of international activities, the organisations selected primarily to develop relations with the not for profit sector in EU to exchange experiences or draw common plans and secondly to intercept resources to develop their own national activity.

## Volunteering Bank of Figueira da Foz

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The Local Volunteering Bank of Figueira da Foz created in 2002 is the local city council program management of the offer and demand of volunteering work, through the inscription of people who wants to work as volunteer and organisations that need volunteers, with the aim to reinforce the local solidarity network. It depends on the City Council Culture, Education and Social Action Department and its mission and goals are to promote and encourage volunteering in the Figueira da Foz municipality, approaching citizens who voluntarily wish to help other people and organisations which can integrate those volunteers in socially useful projects. Among its activities are inscription, interviews and psychological evaluation of volunteers; inscription and interviews of organisation; performance evaluation and training of volunteers; periodic publication of newsletters; emission of volunteer's identity cards; negotiation, redaction and formalisation of volunteering programs; organisations of seminars about volunteering; technical support to the implementation of other local banks of volunteering; diffusion of the work done through encounters and conferences groups based on participants desire for content.

In 2007, 47 new volunteers and 2 organisations joined the Local Bank of Volunteering and have been interviewed. 33 volunteers were integrated in volunteering involving organisations and 48 had access to training actions (initial or continuous). 2007 was also the year of the 5<sup>th</sup> anniversary celebration of the Local Volunteering Bank since its creation.

Member of *Conselho Nacional para a Promoção do Voluntariado* (National Council for the Promotion of Volunteering).

QUESTIONNAIRES

**Volunteering Bank of Figueira da Foz**

▪ Territory covered	Municipality of Figueira da Foz	
▪ Volunteers	3	
▪ Staff	1 part time for volunteer support activities	
▪ Volunteering support activities	PROMOTIONAL ACTIVITIES	Meetings and conferences Public events
	CONSULTING AND ASSISTANCE	Evaluation, interview and close follow up
	TRAINING	Courses, with or without stage Individual classes or seminars
	INFORMATION & DOCUMENTATION	Information office Magazines and periodicals Database

## Volunteering Bank of Lisbon

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The Volunteering Bank of Lisbon, created in 2003, is a direct management service from the Social Action Department of the Lisbon City Council. It is a meeting point between people who want to work as volunteers and not for profit organisations that need volunteers to develop their activities.

Its mission is to structure and systematise the volunteer action, through information and sensitisation, matching the profile of the volunteer to the needs expressed by the organisations.

Its activities include the registration of candidatures of potential volunteers and information of the volunteering actions promoted and proposed by the not for profit organisations, according to their fields of interest and the characteristics of the activities to develop.

Among its achievements: a growing number of volunteers registered in the Local Volunteering Bank and growing integration of volunteers in volunteering involving organisations. More sessions of information and promotion of the bank have also been done.

Member of *Conselho Nacional para a Promoção do Voluntariado* (National Council for the Promotion of Volunteering).

QUESTIONNAIRES

**Volunteering Bank of Lisbon**

▪ Territory covered	Municipality of Lisbon	
▪ Staff	2 full time and 2 part time for volunteer support activities	
▪ Volunteering support activities	PROMOTIONAL ACTIVITIES	Meetings and conferences Public events Cultural events Sports events Festival, expositions, fairs Publications
	TRAINING	Informative sessions
	INFORMATION & DOCUMENTATION	Information office Books, manuals, booklets, Magazines and periodicals
	COMMUNICATION	Press release Creation of special communication events Presence on other media Periodical publications or newsletters Production of lecture notes, books, manuals Website of the Lisbon city council

## **Diocesan Caritas of Beja (Volunteering Bank of Beja)**

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The Diocesan Caritas of Beja is a typical and official institution of the Church that promotes its social action in the city of Beja. It has the legal status of Private Institution of Social Solidarity of Canonical Right. Since 2006, it integrates a Local Volunteering Bank which is a program that aims to promote the match between people available and willing to volunteer, through the development of a set of active and solidarity citizenship actions, and organisations which are developing volunteering programs or projects that need volunteers and gather the conditions to integrate them.

Its mission and goals are the animation and coordination of the social action of the Beja Diocese; supporting and following-up the creation of parochial social action services; promotion of training actions for agents, technical workers and volunteers; contribution for the social transformation, namely within social relationship and values, with the aim of a solidarity development; organisation and coordination, sometimes in cooperation with other institutions, of help assistance in case of natural disasters or urgent public need; organisation of the volunteer action, through information and sensitisation, matching the profile of the volunteer to the needs expressed by the organisations.

The basic activities of this institution include providing social service and assistance for the support of individuals and their families when facing difficulties, both in preventing and/or solving problems connected to social exclusion; social canteen and support service at home (home assistance); follow-up of families receiving Social Income for Insertion; therapeutic community destined to recover people from drug addiction; inscription of potential volunteers and volunteer involving organisations and information of the volunteering actions promoted and proposed by the not for profit organisations; and local centre for supporting immigrant's integration.

In 2007, 370 families in difficulties were supported and 32,366 meals were provided. There were 450 volunteers registered in the local bank and 400 participated in the two annuals Food Bank Campaigns. Training actions about "being volunteer" and sensitise actions for volunteering were also realised. 213 immigrants were received in the local centre.

Member of

- *Rede de voluntariado de Beja* (Volunteering Network of Beja)
- *Conselho Nacional para a Promoção do Voluntariado* (National Council for the Promotion of Volunteering)

QUESTIONNAIRES

**Diocesan Caritas of Beja**

▪ Territory covered	Beja District	
▪ Volunteers	14	
▪ Staff	30 full time for other activities 1 part time for volunteer support activities	
▪ Activities	HEALTH	Health care Rehabilitation Psychological help
	SOCIAL ASSISTANCE	Home assistance Re-education /reintegration Providing essential goods Listening Providing food Support, relation, animation activities Support for learning Social secretariat Research, studies, documentation
	CULTURE AND CULTURAL GOODS	Social cultural animation Training Work orientation Cultural promotion
	CIVIL PROTECTION	Prevention/assistance in case of natural disasters Coordination of solidarity campaigns, funds and essential goods raising for national and international help

**QUESTIONNAIRES**

**Diocesan Caritas of Beja**

	CITIZENS RIGHTS AND TUTELAGE	Civil rights Rights of immigrants
<p>▪ Volunteering support activities</p>	PROMOTIONAL ACTIVITIES	Meetings and conferences Promotional campaigns on mass media Public events
	CONSULTING AND ASSISTANCE	Training processes Events organisation
	TRAINING	Courses, with or without stage Informative sessions
	INFORMATION & DOCUMENTATION	Database Collection of laws, regulations, fiscal norms Books manuals, booklets
	COMMUNICATION	Press release Periodical publications of newsletters Own website



## Holy House of Mercy of Santo Tirso

### [CONTACT]

Santa Casa de Misericórdia de Santo Tirso

### Holy House of Mercy of Santo Tirso

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The Holy House of Mercy of Santo Tirso, created in 1885, is a charity and social assistance institution, constituted in the Canonical Juridical Order. Its values and guideline principles are inspired in the 14 Works of Mercy for the protection and promotion of humanity in the spiritual and corporal dimensions. It integrates a Local Volunteering Bank which is a meeting point between people who wish to volunteer and organisations which are developing volunteering programs or projects that need volunteers and gather the conditions to integrate them.

Its mission is to promote adequate answers and initiatives for the pursuit of its objectives and for the needs of the community, contributing for the local development and protection of the more vulnerable social groups. Among its objectives are: detection of the needs and implementation of measures in the health and social action fields or others similar; establishment of partnerships with public or private entities for the definition and realisation of action strategies; creation and management of social equipments for the community and vulnerable social groups; promotion of vocational training initiatives; preservation of the historical and cultural patrimony; management of the volunteer action, through information and sensitisation, matching the profile of the volunteer to the needs expressed by the organisations.

Its activities are social assistance and health (temporary hosting, day centre, clinical nutrition, social canteen, home assistance, health care, promotion and coordination of self-aid, rehabilitation, etc.) for the support of individuals and their families; follow-up of those receiving the insertion's social income; training and socio cultural animation; promotion of cultural and religious activities; inscription of potential volunteers and volunteer involving organisations, training for volunteers and information on the actions promoted and proposed by the not for profit organisations.

In 2007, in the residential facilities, more than 29 persons were admitted, so in total there were 220 residential users and about 60% had socio-psychological support. 185 clinical nutrition consultations were given. Home assistance was given to 47 new users, totalising 103 users in 2007. 118 families receiving the Insertion Social Income were accompanied. 61 children frequented the leisure activities centre. During 2007, 72 victims of domestic violence were received in the Home Shelter Maria Magalhães. There were more 29 volunteers registered in the Local Volunteering Bank and 9 volunteering involving organisations. Technical support was also given for the creation of a Local Volunteering Bank in another Portuguese municipality.

Member of

- *Rede Social Santo Tirso* (Network between the Social Institutions of the Municipality of Santo Tirso)
- *União das Misericórdias Portuguesas* (Union of the Portuguese Holy House of Mercy or Brotherhood of Mercy)
- *Comissão de Protecção de Crianças e Jovens de Santo Tirso* (Commission of Protection of Children and Young People of Santo Tirso)
- *Conselho Nacional para a Promoção do Voluntariado* (National Council for the Promotion of Volunteering)

## QUESTIONNAIRES

**Holy House of Mercy of Santo Tirso**

▪ Territory covered	Municipality of Santo Tirso	
▪ Volunteers	44	
▪ Staff	270 full time for other activities 8 part time for volunteer support activities	
▪ Activities	HEALTH	Health care Rehabilitation Psychological help Promotion and/or coordination of self-aid
	SOCIAL ASSISTANCE	Temporary hosting Support, relation, animation activities Animation and/or education for street children Home assistance Providing essential goods Research studies and documentation Re-education/reintegration Social secretariat Providing food Support for learning
	CULTURE AND CULTURAL GOODS	Cultural promotion Training Social cultural animation Work orientation Religious cult
	CITIZENS RIGHTS AND TUTELAGE	Civil rights

**QUESTIONNAIRES**

**Holy House of Mercy of Santo Tirso**

<p>■ Volunteering support activities</p>	PROMOTIONAL ACTIVITIES	<p>Promotional campaigns on mass media</p> <p>Meetings and conferences</p> <p>Public events</p> <p>Cultural events</p> <p>Publications</p> <p>Research divulgation</p>
	CONSULTING AND ASSISTANCE	<p>Training processes</p>
	TRAINING	<p>Training sessions and awareness raising actions</p>
	INFORMATION & DOCUMENTATION	<p>Information office</p> <p>Books, manuals, booklets, magazines and periodicals</p> <p>Database</p> <p>Collection of laws, regulations, fiscal norms</p>
	COMMUNICATION	<p>Press release</p> <p>Creation of special communication events</p> <p>Presence in local and national newspapers</p> <p>Periodical publications or newsletters</p> <p>Production of lecture notes, books, manuals</p> <p>Own website</p>

## Eugenio de Almeida Foundation

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Fundação Eugénio de Almeida

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The Eugenio de Almeida Foundation, created in 1963, is a Private Law Corporate Institution in the Public Interest, which contributes for the cultural, educational and social development of the Évora region, according to humanitarian and universal values that have always guided its action. The foundation took the initiative to create a local bank of volunteering in order to promote, valorise and qualify volunteering, as well as to create the needed conditions for its effective development.

The mission statement of the foundation is undertaken in the areas of culture, education, social welfare and aid, as well as spiritually aiming to develop and promote the Évora region. To carry out its aims, the foundation promotes and puts into action a series of initiatives, either on its own or with partners, and support the projects of other public or private organisations in a wide range of activities. The Local Volunteering Bank promotes the match between the offer and demand of volunteers in the Évora region, giving information, training and other kind of support to volunteers and volunteering involving organisations.

The foundation develops activities in 3 main areas: culture and education, social welfare and aid and spirituality. In the culture and education area, the role of the foundation can be seen in the holding of exhibitions and other arts projects, seminars, conferences and events as well as in granting programmes for Masters and Doctorates as an incentive to scientific research and innovation. The foundation places equally a great focus on the maintenance and improvement of the architectural and cultural heritage the founder has left. In the social welfare and aid, the foundation develops projects through training schemes and by helping to improve community organisations and their workers and by forward looking studies on values, attitudes and customs which help to provide an intimate knowledge of social conditions. Its activities are also directed towards those in need, trying to ensure that the support given meets the nature and situation of each case, in accordance with the principles of justice and equality. In spirituality, the foundation, in cooperation with the Archdiocese of Évora, encourages the training of people in pastoral work, promote worship, improve places of worship and contributes toward the restoration, maintenance and preservation of religious art heritage. The foundation, through its volunteering local bank, develops the following activities: inscription of potential volunteers and volunteer involving organisations, encounter between the demand and offer of volunteers, information of the volunteering actions promoted and proposed by the not for profit organisations, training, integration and accompaniment of volunteers in organisations.

Among its achievements are the creation of four proximity centres of volunteering in Évora and creation of a Volunteering Office box, which is a product directed for the dissemination of the methodology and tools needed for the development and management of volunteering prox-

imity centres; and the realisation of three workshops for volunteers and institutions of the Volunteering Proximity Centres, as well as a Volunteering Meeting in the Évora District.

Member of

- *Conselho Nacional para a Promoção do Voluntariado* (National Council for the Promotion of Volunteering)
- *Rede Social de Évora* (Network between the Social Institutions of the Municipality of Évora)

## QUESTIONNAIRES

**Eugenio de Almeida Foundation**

▪ Territory covered	Area of the archdiocese of Évora Évora District and part of Setúbal and Portalegre	
▪ Volunteers	60	
▪ Staff	4 full time for volunteer support activities 98 full time and 95 part time for other activities	
▪ Activities	SOCIAL ASSISTANCE	Support, relation, animation activities Animation and/or education for street children Home assistance Providing essential goods Research studies and documentation Social secretariat Providing food Support for learning Training for managers and technical workers of the social network
	ENVIRONMENT NATURE ANIMALS	History and architectural heritage protection Intervention for the protection of the environment
	CULTURE AND CULTURAL GOODS	Cultural promotion Training Social cultural animation Organisation of cultural visit groups Surveillance in museums and art/historic sites
	CITIZENS RIGHTS AND TUTELAGE	Tutelage of citizens and participation Civil rights

**QUESTIONNAIRES**

**Eugenio de Almeida Foundation**

<p>■ Volunteering support activities</p>	PROMOTIONAL ACTIVITIES	<p>Promotional campaigns on mass media                      Meetings and conferences                      Public events                      Cultural events                      Festival, expositions, fairs.</p>
	TRAINING	<p>Courses, with or without stage                      Individual classes or seminars</p>
	INFORMATION & DOCUMENTATION	<p>Information office                      Database                      Collection of laws, regulations, fiscal norms</p>
	COMMUNICATION	<p>Press release                      Creation of special communication events                      Presence in local and national newspapers                      Production of lecture notes, books, manuals                      Videos and CDs                      Own website</p>

## “Entrajuda” Support for Not for Profit Welfare Institutions

[CONTACT]

Entrajuda

Apoio a instituições de solidariedade social

**Entrajuda**

**Support to Not for Profit Welfare Institutions**

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*Entrajuda* is a Private Institution of Social Solidarity, created in April of 2004 and recognised as a Collective Person of Public Utility in 2005. Inspired by the intervention of the Food Bank against Hunger, which is in its genesis, *Entrajuda* is an innovative project in the social area, which aims to help institutions in improving the services provided to beneficiaries and to mobilise and facilitate the involvement of people and corporations that want to cooperate and put their work, experience, goods and services at the institutions' disposition.

The first group supported was precisely formed by the 260 beneficiary institutions of the Lisbon Food Bank against Hunger, since there was already a profound knowledge of their needs and shortages.

*Entrajuda* tries to establish the bridge between people who need and who want to give, creating a true solidarity chain. *Entrajuda* is a Private Institution of Social Solidarity, which aims to help other institutions at the organisation and management level in improving their performance and efficiency for the benefice of needy persons. Laying on the mobilisation and involvement of person and corporation of good-will, *Entrajuda* make diagnosis of the institutions' problems and needs, present and implements solutions, mobilise partners and volunteers and evaluate performances and impacts. Structured products and services are provided to other private institutions of social solidarity. All the individuals or corporations with preoccupations of social responsibility that, as volunteers, wants to be associated to this project can make a difference and help social solidarity institutions to provide their support to needy people, in a more structured and efficient way.

*Entrajuda* has supported social solidarity institutions in the following intervention areas:

- Management and organisation in order to improve the performance of institutions. This has been done through providing a set of products and services in a diversity of areas, management or technical, that, according to the needs detected and the institutions in question, can be specifically or generally structured.
- Solidarity health care: creation of a group of doctors of different specialities, who, voluntarily, accompany continuously and during a given period of time ill or needy people presented by the institutions supported.
- Distribution of non-alimentary goods and of electronic equipment.
- Training for technical employees and managers or social solidarity institutions.

Among its achievements there are the creation of the non-alimentary goods banks; creation of the electronic equipments bank; implementation of a chain of solidarity doctors and development of prevention and care actions, namely in the area of oral care and diabetics; and creation of the volunteering online bank



QUESTIONNAIRES

**“Entrajuda” Support for Not for Profit Welfare Institution**

▪ Territory covered	Portugal	
▪ Volunteers	90	
▪ Staff	5 full time for volunteer support activities	
▪ Activities	HEALTH SOCIAL ASSISTANCE	Health care Support, relation, animation activities
▪ Volunteering support activities	PROMOTIONAL ACTIVITIES	Meetings and conferences Public events Cultural events Publications Research divulgation
	CONSULTING AND ASSISTANCE	Fiscal and administrative Legal and notarial Management Technology Training processes Events organisation Communication Access to European funds European voluntary service
	TRAINING	Courses, with or without stage Individual classes or seminars
	INFORMATION & DOCUMENTATION	Information office Collection of laws, regulations, fiscal norms

**QUESTIONNAIRES**

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**“Entrajuda” Support for Not for Profit Welfare Institutions**

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■ Volunteering support activities

COMMUNICATION

Press release

Press conferences

Creation of special communication events

Presence in local and national newspapers

Presence on other media

Periodical publications or newsletters

Own website

# Development policies

## 1 PUBLIC INCENTIVES (QUESTIONNAIRES)

### VOLUNTEERING ACROSS EUROPE

In Portugal, volunteering was traditionally linked to the Catholic Church or other religions; only recently, the culture of an independent and organised volunteering is starting to grow, specially a volunteering of regularity and commitment, not only of punctual actions. But there is still a general lack of knowledge from both, volunteers and organisations, of their mutual responsibilities. When they assume a mutual commitment, it implies rights and duties, which are synthesised in the Framework Law on Volunteering but, sometimes, they aren't aware of that. In effect, the Law no.71/98 and the Law Decree no.389/99 represent the assumption by the Portuguese State of the importance of volunteering for the construction of a more equitable, solidary and developed society; but more actions of information are needed. Simultaneously, a qualified volunteering emerges with real intervention in the life of the private institutions, which frequently can't employ professional workers due to a shortage of resources.

In logical terms, local centres for the support of volunteering should be constituted mainly by volunteers, but even that implies some costs that frequently the institutions cannot afford. Consequently, private institutions have great difficulties to develop this kind of activity without some financial or technical public support. So, on the one hand, some more support to local volunteering centres should be given, not only financial but also and mostly technical, as well as support for training trainers. In fact, measures or initiatives concerning the capacitating of all involved agents and the development of communication actions could give more visibility of the volunteering culture. On the other hand, volunteers need to be supported too, with fiscal benefices for instance, as a way to compensate their contribution for the society.

Understanding volunteering and its contribution for the development of the community and of the country as a whole is essential for its recognition and valorisation. So it is important to sensitise and encourage population for volunteering, namely through more campaigns.

In summary, according to the Volunteers Support Centres questioned, more volunteering projects are needed and campaigns of information, as well as support to structure aiming to encourage and develop volunteering and qualification/training for volunteers and workers.

## 2 STRATEGIC GOALS (INTERVIEWS)

Volunteering is carried out by organisations that most of the times have mainly remunerated professionals and

consequently volunteers and volunteering, in a certain measure, are not benefiting some important initiatives that otherwise could. So there's a gap at the level of initiatives for volunteering and volunteers. However, there have been some favourable actions, namely, initiatives for training volunteering trainers in the Portuguese districts, promotion of studies about volunteering, especially with the 2001 International Year of Volunteering, and the solicitation of volunteers for some kind of activities, social, cultural or environmental, which hasn't yet been developed in all its potential.

If there is, in society, an awareness of volunteering as a response to concrete problems, it will be automatically valued and have public recognition. In some fields, namely in health care, volunteering is already considered very important and socially valued, whereas in some other areas, with less public visibility, it is not so valued. The work developed by organisations is generally known but frequently the important role played by volunteers in the development of those organisations' activities isn't. So, organisations are valued, but the volunteers' work is not so valued. Therefore, the own organisations should stand out the role played by volunteers.

A better knowledge of volunteering and the problems that need its intervention, on the one hand, and promoting the match between that offer and that demand, on the other hand, is a field of action for the public agents in articulation with the CVP and others institutions to develop, that hasn't completely been covered. At the local level, the volunteering centres can be very helpful in this matter if they succeed in gathering the conditions already mentioned: on the one hand, giving technical support to organisations when integrating volunteers and even to their own development and, on the other hand, giving training to volunteers namely within the configuration delineated by the CNVP. One aspect, which requires some prudence, has been referred by some interviewees: most of the Local Volunteering Banks are coordinated by employees of the city council who have frequently to fulfil some predefined objectives. Sometimes, the exaggerated focus in corresponding to the quantified objectives, since their evaluation will depend on it, can influence negatively the quality of the services provided, namely at the level of selection and profile of vol-

unteers. Besides, the fact that those volunteering banks are managed by paid workers constitutes by itself a contradiction.

In the matter of legislation, the existing framework on volunteering may contain some inaccuracies or inadequacies but it does not seem problematic. It would be better to maintain the legislation as it is now and when volunteering turns to be more dynamic, it will be able to suggest spontaneously the aspects that should be reviewed. The main inaccuracy, in one of the interviewees' point of view, is that the law does not consider informal volunteering and, in doing so, it does not recognise the humanitarian and community base of volunteering. However this is understandable because this kind of volunteering is carried out by informal subgroups of volunteers which are, in general, difficult to reach although it exists everywhere. Another inadequacy is that the organisations mentioned in the law are primarily public and secondly private when it should be the other way round. According to another interviewee, legislation is important to guide and organise volunteering, but it should be flexible enough to give volunteering organisations a certain freedom of management and no chance of opportunism. So, legislation should also contemplate the following four aspects: volunteers' selection forms, training structures, organisation and evaluation.

In the National Commission for the International Year of Volunteering of 2001, one theme discussed was the creation of motivating or promoting conditions for volunteering, namely, the possibility to give credit hours to volunteers, similar to the now foreseen situation for the members of the board direction, but it would require granting the respect of ethical conditions in order to only concede this statute when really due. On the other hand, some employers could refuse to employ volunteers knowing that they have the right to a certain number of credit hours for voluntary activities. So, this is a delicate theme that requires some more profound reflection.

Another measure would be, for example, in the access of certain occupations or university courses, between candidates in equal circumstances, to select the one who has done voluntary work. In certain countries, namely in United Kingdom, voluntary activities are considerably valued in curricular terms. Sometimes some schools, by

the teachers' initiative, invite some volunteering involving organisations to make presentations in their classes. This type of initiative helps to promote volunteering and sensitise students to its importance, but they are sporadic. More similar initiatives could be undertaken on a more regular basis.

The relationship between volunteers and employees is not always very clear and consequently a certain tension might be generated. It requires a global strategy in order to value the work and dedication of volunteers and employees, to clearly define their roles and to widespread their complementary character. Many of the volunteering in the institutions is at the level of the social organs. They have to define their plan of activities and analyze how many volunteers they need to carry on their plan. Frequently, they assemble volunteers through their personal and social contacts or networks. Global campaigns to sensitise people to the general principles of volunteering, namely to be an active and participative citizen in the society through voluntary work, are preferable rather than each institution doing its own campaign to recruit volunteers in a massive way.

Measures such as the creation of a system of insurance for volunteers are undoubtedly valuable, but some people disagree with the establishment of some sort of retribution, as has occurred with many programmes for volunteering, namely those managed by the Portuguese Institute of Youth, where the volunteers had the right to a monetary compensation. The volunteering organisations must be supported: expenses should be covered, but not copying remunerations. If it is volunteering, then it has to be treated as volunteering which implies gratuity. The volunteering integrating organisation should be responsible for controlling the expenses of volunteers and granting that they are duly reimbursed. The characteristics that a volunteer must have are to sense the other, to forget himself (that is gratuity at all the levels), to dedicate with responsiveness to the work for which he has been prepared and to respect the organisation once he is integrated.

Some other measures to support volunteering were mentioned by the interviewees, namely, fiscal benefits, support to head-office premises, structured subsidies, network support through mutual co-

operation between organisations and the creation of an observatory of good practices in volunteering.

### 3 EUROPEAN PERSPECTIVE (INTERVIEWS)

Some studies that have been made conclude that in Portugal the volunteering average rate is lower than in the European countries. But, in fact, Portuguese volunteering is not so structured or integrated as in other countries and therefore it isn't so qualified either. It seems evident that some countries are in a more advanced position in terms of formal volunteering, but there is no evidence that they are more advanced considering volunteering *tout court*. It is a key issue, for countries with social and cultural environment similar to the Portuguese one, to make visible this kind of volunteering (called "proximity volunteering"), eventually of less qualified persons, which is in direct contact with problems and people. Considering this aspect, there is no certainty that Portugal is at a lower position relatively to other countries. Portugal can and ought to assume this kind of volunteering, develop it increasingly, qualify it and integrate it. Then, it certainly would have volunteering rates very similar to the European average. Besides, at the level of volunteering in other European countries there are considerable miscellanea even in terms of concept. In some countries, the attribute of volunteer is sometimes given when one of its fundamental requisite is not present, which is gratuity. If there isn't gratuity, it doesn't make sense to speak of volunteering. The designation of Private Institutions of Social Solidarity conserves in itself the genuine matrix of volunteering rooted on gratuity.

A European initiative in support of volunteering should be developed on three levels: firstly, it should promote an increasing knowledge of volunteering, eventually through qualitative surveys in the beginning; secondly, it should find out at the European level which problems volunteering help to solve; thirdly, it should clarify the volunteer status, to harmonise some criteria and then articulate some lines of action according to its dynamics. Furthermore, still at a European level, it would be convenient to examine which role volunteer-

ing could have in the promotion or anticipation of public policies, meaning that sometimes it can launch some activities which are later politically assumed. Additionally, it would also be convenient to find out in which extent volunteering contributes to the effective solution of the existing problems and eventually establish networks of mutual help and exchange of experiences. However, there is one thing that should be preserved in any European initiative, which is to be aware of the different characteristics of volunteering in each country member. It would be very interesting to support and to promote the participation of volunteering involving organisations in European projects

or networks and to grant a wider dissemination of information produced at the European level.

In the opinion of all the interviewees, the international cooperation is always worthy, especially if it doesn't try to impose standards, but instead promote the opportunity to share experiences and knowledge, bring ideas and people together, develop better networks and structures, disseminate good practices and establish common or even convergent objectives, respecting entirely the differences among all the countries, particularly the informal and qualified volunteering in the case of Portugal.

**LIST OF PERSONS INTERVIEWED**

Five interviews with representatives of voluntary organisations and/or experts were made in order to collect an overview of the actual and future situation of volunteering in Portugal. The interviewees shared their opinion on several topics concerning volunteering actions, namely, the role of volunteering, motivations, volunteering infrastructures, needs of volunteering organisations and networking.

**Acácio Catarino**

Social consultant who collaborates with many volunteer organisations. He has a large experience of work as a volunteer in many organisations and was the former President of the National Council for the Promotion of Volunteering (CNPV), former consultant for the Republic Presidency in the social and labour areas and former President of Caritas Portuguesa.

**Mohamed Ahmed**

One of the founders of the National Association of Microcredit (*Associação Nacional de Direito ao Crédito* – ANDC), who has been recently elected as its new President.

**José Centeio**

Secretary-General of ANDC since its creation.

The ANDC is a not for profit private association, created in 1998 by a group of persons who concluded that it was necessary to promote in Portugal a project similar to the one developed by Muhammad Yunus in 1976 in Bangladesh. Since 2004, this association has been recognised as an Association of Public Utility. The ANDC gives support to people who cannot meet even the most minimal qualifications to gain access to traditional credit, usually unemployed persons or living in poverty, and helps them to engage in self-employment projects al-

lowing them to generate an income and, in many cases, begin to build wealth and exit poverty. There are many volunteers working at the ANDC in a variety of services such as attendant, technical assistance or promotional activities.

**Eugénio da Fonseca**

President of the Portuguese Confederation of Volunteering, President of Caritas Portuguesa and Caritas Setubal.

The Portuguese Confederation of Volunteering (CPV) is an association that represents the Portuguese volunteers and their organisations, in all their domains of activities. The CPV intends to contribute for the defence of the volunteers' rights and interests through its actions, namely by representing the Portuguese volunteering, preserving the identity of the volunteer, developing the cooperation between volunteering organisations and promoting the voluntary action.

**Isabel Jonet**

President of the Portuguese Federation of Food Banks against Hunger, President of the Lisbon Food Bank against Hunger and President of *Entrajuda*, an institution that supports other Portuguese institutions of social solidarity.

Created in 1992, the Portuguese Food Banks mission is to provide food to people living with hunger, through social solidarity institutions, and it is supported through public campaigns to raise food and funds and to spread awareness of domestic hunger and simultaneously fight against waste. All over Portugal, there are 15 regional Food Banks that count on the help of thousands of volunteers for the development of their activities. Those regional Food Banks were created by groups of people that willingly and as volunteers wanted to give form to this kind of projects. In fact, volunteers are the fundamental key for this type of organisations.

Vitor **Feytor Pinto**

National Coordinator of the National Commission for the Pastoral Health Care and President of the Health Commission of the CNPV.

The National Commission for the Pastoral Health Care, created in 1985, is the institution that coordinates, at a national level, all the

Catholic, religious or laic organisations which work in the area of pastoral care. The Pastoral Care worker or visitor, many times a volunteer, provides the patient with an opportunity to voice his anxieties, fears and hopes and helps him to look at them from a different perspective.



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## INTERNET RESOURCES

### National Council for the Promotion of Volunteering

[www.voluntariado.pt](http://www.voluntariado.pt)

[Portuguese]

### Portuguese Confederation of Volunteering

[www.convoluntariado.pt](http://www.convoluntariado.pt)

[Portuguese]

### Portuguese Firemen League

[www.lbp.pt](http://www.lbp.pt)

[Portuguese]

### Portuguese Caritas

[www.caritas.pt](http://www.caritas.pt)

[Portuguese]

### Portuguese Holy Houses of Mercy Union

[www.ump.pt](http://www.ump.pt)

[Portuguese]

### National Confederation of the Solidarity Institutions

[www.cnis.pt](http://www.cnis.pt)

[Portuguese]

### Portuguese Red Cross

[www.cruzvermelha.pt](http://www.cruzvermelha.pt)

[Portuguese]

### Portuguese Platform of Development NGOs

[www.plataformaongd.pt](http://www.plataformaongd.pt)

[Portuguese]

### Portuguese Legislation

[www.dre.pt](http://www.dre.pt)

[Portuguese]

**COUNTRY FACT SHEET SOURCES****Eurostat Database**

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