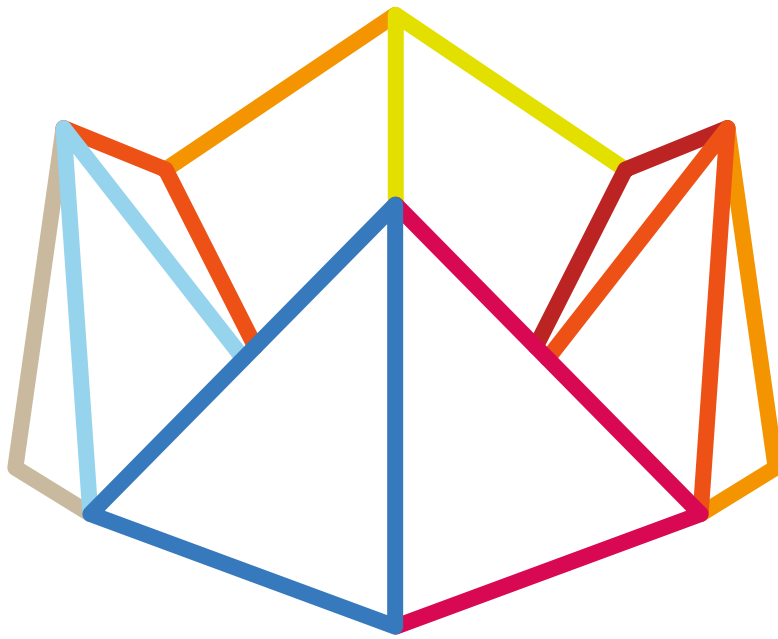


ANNUAL REPORT




FUNDAÇÃO
FRANCISCO MANUEL DOS SANTOS



**HOW MUCH DO YOU
WANT TO KNOW?**

Fundação Francisco Manuel dos Santos

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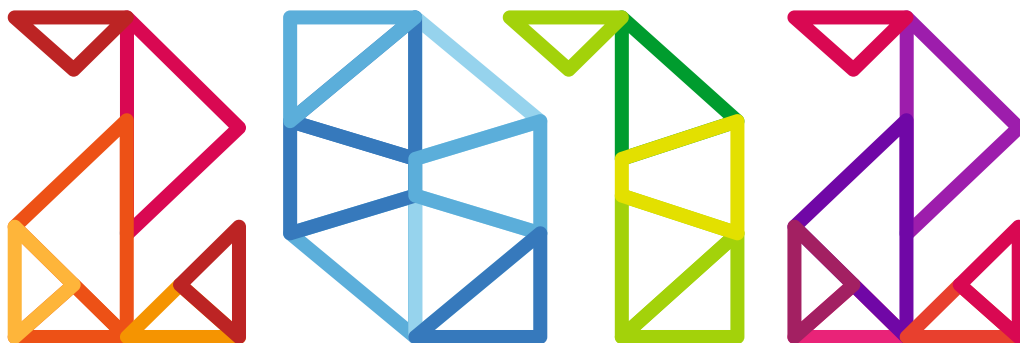
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ANNUAL REPORT



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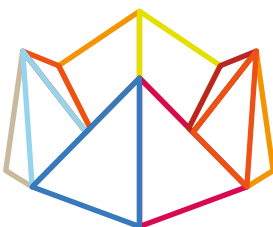
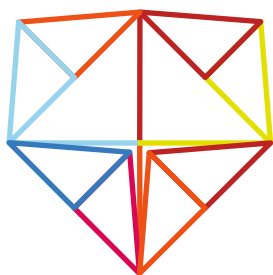
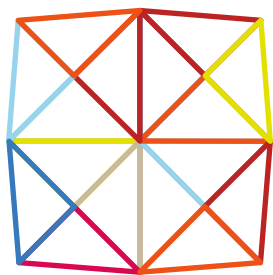
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1.

ACTIVITIES' REPORT



1. INTRODUCTION

On the subject of the Foundation's fourth year of life, one should point out: the consolidation of some activities initiated in previous years, the opening to new initiatives; the first organisation of a widespread diffusion action; some other attempts at organising the extensive diffusion of our materials and the organisation of the first public debates, including physical and on-line attendance. The discussion about the Foundation's statutory regulation (and that of Portuguese foundations, in general) caused by the approval of new legislation should also be added to the above-referred central aspects of the Foundation's activity in 2012.

Projects and activities such as PORDATA, the Foundation's Essays and the Education Conferences have completed three years of life. The Studies continued and the publication and discussion of its findings has been initiated. A new activity deserved special consideration: the conference about Portuguese population "Meeting the Present in the Future - The Portuguese People in 2030". Such an activity, due to its extent and great visibility, has raised the bar of the Foundation's actions to a higher organisational degree, which needs

to be taken into account in any future programme planning.

Over thirty projects are in progress by the end of 2012, which allows us to foresee an intense dissemination activity within the next couple of years. In this time frame, on the other hand, it will be necessary to start preparing the projects that will be executed and mature, from 2014 to 2016.

For the first time ever, the Foundation commissioned a brief study on degrees of recognition. Nationwide FFMS is not yet spontaneously well-known but in the metropolitan areas of Lisbon and Oporto approximately one third of the respondents identified our institution. This is an incentive to carry on and to improve our action.

As previously anticipated, the dissemination of information, knowledge and of the outcome of the projects we have accomplished has probably constituted the main concern within the subject time frame. It will continue to be so in the near future. Indeed, Portugal has little experience on such dissemination activities, in particular if associated to public and open debate, which is a core requirement of our mission. Although several initiatives were achieved (one Meeting, conferences, book launches, working groups and reunions, seminars, press, radio and TV presentations, etc.), we still need to continue looking for the ideal dissemination channels, the most adequate communication methods and

the most effective ways to organise debates. In Portugal, the tradition of public debate is neither very consistent, nor very rich and therefore we need to follow a track that leads into the creation of our own path.

Debate is one of the central axes in the scope of FFMS's mission, which shall only be meaningful if it can be held impartially and freely and not be guided by worn-out rules of political dependence, propaganda and publicity.

By the end of 2011, the Board of Directors approved a reflection about the Foundation's mission and functions (published in the 2011 Annual Report), which was discussed in the Board of Trustees and in the Scientific Board, and converted into a practical extension of our "Charter of Principles" (published once more in *Appendix 1*).

Our previous report already alluded to the social and economical difficulties our country was facing at that time. The situation has not improved subsequently, on the opposite. Given FFMS's nature and its independence regarding the State, we did not undergo the effects of difficulties and public austerity. However, in its activities' programmes, FFMS cannot be unaware of what our country is experiencing. Therefore, some of the initiatives were adopted taking into account the actual problems of Portuguese society and Portuguese people. Accordingly, an internet portal available to the public, entitled "Understanding the crisis",

was created, for instance, as well as we have engaged in studies on social inequalities.

Finally, the so-called "survey of public and private foundations" process, carried out by the Government, came to conclusion. Last year, FFMS addressed severe critical observations in respect to several aspects of such a survey, both independently and in association with the Portuguese Centre for Foundations. This critical attitude, although still a constructive one, was further amplified due to the recent publication of the new "Law on Foundations"; in particular, because it produces a virtual equivalence between public and private foundations allowing a sort of intrusion by the Government in private institutions, even when they do not receive any support from the State. All our criticisms have been made public and addressed to the Government. Incidentally, the Government favourably accepted certain observations by FFMS.

2. STRUCTURE AND PREMISES

There were no important structural changes during last year. The working team was kept light and compact. The main rule continues to be outsourcing for the provision of services. *Appendix 2* (“Organisation, Position and Duties”) includes the name and position of FFMS’s staff. The existing team was added of one element (*Teresa Mourão-Ferreira*). PORDATA’s Manager, Maria João Valente Rosa, retained her position with FFMS as a service provider although her main collaborators (*Ana Barbosa, Joana Martins* and *Rita Rosado*) are now employed by the Foundation. In the Information and Technology area, one of the collaborators (*Rui Pimentel*) increased his dedication to the Foundation. At PORDATA, due to the need of significantly increasing the training area, we decided to engage a group of people which, in several Portuguese cities, are able to perform that job. The Board of Directors (a Chairman and two non-executive Directors), the Board of Trustees and the Scientific Advisory Board remained unchanged. In 2013, and given the great work pressure that has been pending on such a reduced group of individuals, the central structure of this organisation could be reinforced, but

moderately, not involving recruiting that could later prove unjustified or that could adversely overweight on FFMS’s operation.

At the end of the year, the Foundation moved from its premises. We departed from Tower 3 at Amoreiras and we are presently occupying a building located at Largo Monterroio Mascarenhas, just in front of the Amoreiras Towers. In this building, UNILEVER’s traditional head-offices, three floors have been made available: one floor is dedicated to FFMS and the two remainders are dedicated to the Francisco Manuel dos Santos Society (SFMS) and to the founding family. The Foundation now sits in satisfactory space and comfort. The working conditions have improved and the proximity between SFMS and FFMS is beneficial. PORDATA continues to occupy rented office space in Rua Conselheiro Fernando de Sousa.

We have started preparing for the reorganisation of our activities, notably by grouping around areas. This organisation task is likely to progress in 2013, quite particularly in respect of the responsibilities of scientific coordinators and of the members in the Scientific Advisory Board.

It was decided that the statutes would not include the Scientific Advisory Board as a governing body for the Foundation. The main reason for this lies in the new Law for Foundations that requires the Prime-Minister’s approval for any statutory changes. In light of

such requirement, which is regarded as inappropriate by FFMS, it was decided to keep the statutes as lean as possible, in order to avoid excessive legal and bureaucratic procedures.

The recently created advisory bodies (Education; Science; Economic Justice; Portuguese participation in the European Union decision making; Cultural Values, Economic development and the Quality of democracy; Meeting the Present in the Future; and the Annual Magazine “XXI – *Ter Opinião*”) remain in operation and have proven very valuable in their contribution for the Foundation’s scientific capability. On the other hand, they are also permanently passing on other experiences and that allows us to maintain an open attitude.

The Publications Department, created in 2011 and managed by António Araújo, continued and further developed its activities.

At the request of CPF – Centro Português de Fundações (Portuguese Centre for Foundations), FFMS’s Chairman took up the functions of Chairman in the Organising Committee for the Annual Meeting of Portuguese Foundations, held in April 2012.

3. GOVERNING BODIES: BOARD OF TRUSTEES, AUDIT COMMITTEE, SCIENTIFIC ADVISORY BOARD

The governing bodies of the Foundation remain unchanged (*Appendix 3*).

The Board of Directors meets regularly. The two non-executive Directors perform their duties without being paid any remuneration by the Foundation but notwithstanding this fact with the utmost dedication. The Chairman of the Board of Directors, once again, highlights their excellent contribution.

The Board of Trustees and the Audit Committee held two meetings each. The Board of Directors thanks both bodies for their excellent collaboration and constant availability.

The Scientific Advisory Board met four times in plenary sessions. The minutes of the meetings and the corresponding records and transcripts are available for consultation at the Secretariat.

Throughout the first four years of FFMS's life, this body has been the core centre for discussions and reflection about the Foundation's activities and projects. It has ensured interdisciplinary dialogue and interchange of professional experiences, which were useful in project launching and in starting off our activities. At FFMS's current stage of life, while monitoring the drafting of new statutes, the Board of Directors has been contemplating the best way to ensure "transversal" dialogue and the coordination amongst several projects, which will likely translate into new guidelines for 2013 and the following years.

Some members in the Scientific Advisory Board took on functions of support to the Board of Directors, of scientific coordination in activities or projects; they were in charge of programmes, evaluations and acted as scientific juries. Such collaboration was definitely highly valuable and very relevant: the major stake of the Foundation's projects relied, one way or another, on the collaboration of such Advisors.

4. STATUTES, NEW LAW ON FOUNDATIONS AND PUBLIC INTEREST

The statutes of the Foundation have been drafted in 2012 and will likely be approved by the Board of Trustees in 2013. In these new statutes, the Board of Directors, with the endorsement of the remaining governing bodies, decided to cut back on its involvement up to the requirements in the new law. Thus, a Board of Directors and an Executive Commission will be formed.

As a result of the Survey on Portuguese Foundations, FFMS was assessed by the Government and received a grade of 64,5%. Immediately thereafter, we initiated a course of action in order to challenge the methodology and the empirical matter under analysis. After the reassessment, the FFMS was rated 71,2%.

The official recognition of the Foundation's Public Interest was granted on 12 March 2010 (Official Gazette of 23 March 2010) and was confirmed after the publication of the new law (*Appendix 4*).

During the whole discussion process of the Law for Foundations, FFMS always kept in constant collaboration with CPF – Centro Português de Fundações (Portuguese Centre for Foundations), seeking for a solid coordination of positions, which seems to have been achieved. The provisions in new law that could be detrimental for FFMS (and for many other private foundations) treated private and public foundations (State and Municipalities) alike. Several clarifications and some amendments were included therein to soothe this initial deficiency. On the other hand, “the will of the Founder”, where private foundations are concerned, was granted its proper significance and was legally recognised. Finally, an equivocal legal clause that confined the Foundation’s activities (by defining caps for authorised expenditure in relation to the institution’s income) was clarified and its scope was reduced.

5. PERMANENT PROJECTS

THE FOUNDATION’S INTERNET PORTAL

In 2012, the Foundation’s website (www.ffms.pt) has grown in its contents, functionality and services. In that line, we should point out the “*Documentaries*” area, the launching of a structured plan for On-line Debates and the activation of on-line sales.

With a weekly agenda of launchings and debates, FFMS registers more than one hundred thousand individual visitors and over one hundred contents in the Foundations “*you tube*” channel.

Considering the collection presently held by FFMS and the multiple formats of its contents, during the next year we will implement a plan intended for the evolution of the site, with the double purpose of responding to the dynamics of FFMS’s contents and of integrating the various internet sites that already exist.

PORDATA

The activities of PORDATA continued, with special emphasis on maintenance and updating. A new theme was included: “Electoral Participation”. The most significant development was the launching of a new database, “Municipalities”, adding up to the two previously existing ones, Portugal and Europe. Moreover, the second edition of “Portrait of Portugal – PORDATA” was launched and the preparation for “Lisbon Portrait – PORDATA” was initiated. The latter, accomplished by means of a partnership with the Lisbon Municipality, was posted on-line in 2012.

Consultation and visits to PORDATA have kept constant at a high level (see *Appendix 5*). The reflex of the constant use of this database is patent in press, radio and TV.

Approximately 3.600 trainees attended PORDATA’s training actions. In total, the actions accomplished in three years (see *Appendix 6*) extended to 8.081 trainees in aggregate numbers, from the beginning of our training plan. The majority of our trainees are college students (44%), followed by high-school students (30%).

Subsequently to PORDATA’s training project in cooperation with “RBE – Rede de Bibliotecas Escolares” (Network of School Libraries), the Foundation handled the second edition of a contest bearing its name. Approximately 2.000 students of 60

different schools participated, directly and indirectly. A public session held at the Rainha D. Leonor High School, in Lisbon, concluded this action and proclaimed the contest’s winners.

Maria João Valente Rosa (who is also a Scientific Advisor for FFMS) leads the team in charge of PORDATA, which remained unchanged and includes *Ana Luísa Barbosa, Joana Martins* and *Rita Rosado*. Bernardo Gaivão is in charge of training actions. In 2013, the Foundation expects to arrange for trainers in several Portuguese cities.

INTERNET PORTAL: “UNDERSTANDING THE CRISIS”

The Foundation believed that attempting to understand the evolution of society’s well-being was important in this period of exceptional difficulties our country is undergoing. Taking into account that social conditions are quantified by the country’s official statistics but also by data about social protection and consumption patterns, this project relied on the partnership of official institutions (Bank of Portugal and INE), civil organisations (“Banco Alimentar”) and companies such as Nielsen, Unicef and “Confidencial Imobiliário”.

Launched in March 2012, the internet site www.conhecercrise.pt includes over one hundred indicators up-dated quarterly, every six months or annually,

**CAN STATISTICAL
AVERAGE
SUMMARIZE
A COUNTRY?**

The infographic features three tilted, multi-colored geometric frames (yellow, orange, and blue) containing text. The background is white with several stacks of purple 3D blocks. At the top, hands are shown placing blocks. The bottom left shows more geometric shapes.

129

In Portugal, there are 129 elderly persons for each 100 youngsters. In more than 100 municipalities, there are at least 2 elderly persons for each young person.

PORDATA Regions (www.pordata.pt)

868 €

is the amount of the average compensation per worker in Portugal. Oeiras is the municipality with the highest amount (1.452 €) whereas Mondim de Basto is that with the lowest amount (559€).

PORDATA Regions (www.pordata.pt)

4%

In Portugal, 4% of the residents are immigrants. But at Albufeira, they are 27% and at Ribeira de Pena they are less than 1%.

PORDATA Regions (www.pordata.pt)

organised according to major themes, such as Employment, Housing, Welfare, Debts of Individuals and Companies, Family Expenditure and Economic Conjecture.

We anticipate incorporating new themes and information sources allowing for an even more complete analysis of the changes in the behaviour of families, companies and of the State.

Currently, the site relies on the collaboration by *Marco Lourenço* for the up-date of all indicators, in cooperation with the project's partners.

INTERNET PORTAL: CITIZEN'S RIGHTS AND DUTIES

Nuno Coelho is in charge of this project (coordinating a substantial team of legal experts, professors, magistrates and lawyers) with the support of *Mariana França Gouveia*, on FFMS's part, with the purpose of creating an Internet portal whose object is the citizens' rights and duties. In a digital format, we aim at making available means of information that are trustworthy, accessible, organised and practical, in respect of the rights and duties that each individual needs to cope with as a citizen, in the wide range and multiple situations that are typical of one's life.

We expect to launch this portal in 2013.

POP, PUBLIC OPINION PORTAL

Alice Ramos and *Cícero Pereira*, oriented by Advisor *Pedro Magalhães*, are in charge of this internet portal, which is a product of the cooperation between FFMS and ICS – Instituto de Ciências Sociais da Universidade de Lisboa (Social Sciences Institute of the Lisbon University), aimed at making the findings of twenty years of public opinion in Portugal and in Europe accessible to any concerned party. The website www.pop.pt gathers information based on three major European surveys – Euro Barometer, European Social Survey and European Value Studies –including more than one hundred indicators on a wide range of themes, such as Family, Religion, Politics and Economy. Data concerning approximately 30 European countries will be available and POP will permit the analysis of the evolution in public opinion over time, the comparison of public opinion in different nations and to cross-reference two indicators simultaneously.

The site will be launched in early 2013.

DOCUMENTARIES

The Foundation intends to start producing a series of documentaries about present-day themes in Portuguese society. FFMS's publications, in particular "The Foundation's Essays", reached tens

of thousands of readers and were followed by related debates. With the documentaries, notably by making use of television, we aim to reach hundreds of thousands of viewers. But the purpose remains unchanged: an ongoing invitation to debate current realities.

FFMS's first documentary was broadcasted in 2012 by private TV channels *SIC Notícias* and *SIC Mulher*. Directed by Joana Pontes, having Xavier Barreto and José Pedro Correia as co-authors and produced by Patrícia Faria, the film "*Born to live*" was based upon a study commissioned by FFMS about the evolution of infant mortality in Portugal.

From now on, we expect to produce two to three documentaries annually and this series shall not be limited to Foundation's studies. Cinematographic narrative is able to deepen out themes about the life of individuals and companies that are not necessarily originated in academic projects.

FFMS's entails an author's perspective for its documentaries, ensuring the approach translates into a script documented by the investigation of its own team, possibly including testimonials.

The Foundation devised a dissemination plan for its documentaries including, among others, TV broadcasting, DVD distribution and the dissemination

of all contents on the internet (films, interviews or specially edited contents for the internet). The debate around the documentary is essential and thus, all information helping to substantiate opinions on a given theme shall be considered for dissemination.

BIBLIOGRAPHIES AND CHRONOLOGIES

As an addition to the existing databases, FFMS has decided to commission and to disseminate bibliographies on all the relevant themes of Portuguese history and society, as well as chronologies for a recent period, from 1960 to the present days. Such works are expected to produce framework instruments for quantitative data (PORDATA, Understanding the crisis, Public Opinion Portal). *Paulo Oliveira e Sousa* is in charge of this project. The Bibliographies are concluded and the Chronologies will be available in a few months (see *Appendix 7* for the chapters of Bibliographies and Chronologies).

PUBLICATIONS BY THE FOUNDATION

After its reorganisation and the appointment of *António Araújo* (who is also a Trustee and Manager for the "Foundation's Essays"), the

publications sector is now prepared for the development of its activities expected in the years to come. In fact, given the fact that several projects are now concluded, this sector will require a new dimension. Also, FFMS needs to ponder carefully the relation between printed publications and publications distributed solely on the internet.

In 2012, another 9 essays were published, along with circa a dozen volumes of autonomous studies (on Health, Legislative Assessment, Economic Justice, Economic Inequalities) produced as an outcome of special projects on a wide range of themes, such as Culture, Climate Changes and the Future for printed and digital books (See *Appendix 8* for the Foundation's Publications).

Up to December 2012, the Foundation sold 254.760 copies of the Essays and this certainly is a reason to rejoice. Given its nature of essays, such quantities are a little unusual or even very unusual in Portugal. The subsidized price of each volume (3,50€ for a sewn paperback; 5,35€ for a hardcover) is definitely an incentive and FFMS considers this as one of its duties: keeping prices affordable. For this reason, sales' prices are still the same as in FFMS's first year of activity. In fact, it is undeniable that price is a limitative factor in access to books. Indeed, since austerity has settled in and economic difficulties are widely present, there has been a small decrease in the number of volumes sold.

2012 was also marked by the bankruptcy of our distribution company (SODILIVROS) generating very serious problems, notably loss of cash and income (as to sold copies), loss of volumes not distributed yet, but outside our control, and also disruption in distribution channels. FFMS's financial statements indicate the loss accumulated so far. The new distributor that started to work with the Foundation, VASP, has extensive experience in newsstands, bookshops and supermarkets.

THE FOUNDATION'S ANNUAL MAGAZINE - "XXI, TER OPINIÃO"

The second volume of the Annual Magazine "*XXI, Ter Opinião*" (*Having an Opinion*), steered by José Manuel Fernandes, was published in November 2012 and the number of magazines sold was equivalent to first year sales, ranging 9.000 copies. An Editorial Board was set up in order to support the Annual Magazine Manager (see membership in *Appendix 10*).

The central theme, or cover story, in this second volume aggregated several contributions: "Bye-bye Freedom. Hooray Freedom!" This theme is an integral part of the genetic code of the Francisco Manuel dos Santos Foundation.

THE FOUNDATION'S PORTRAITS'

The “Portraits” collection intends to publish monographs dedicated to institutions, individual situations (professional or personal) and Portuguese regions, with a “in-depth reporting” style that starts by describing a specific or local element and resorts to inductive reasoning, in order to address a wider reality, although briefly. Regarding publication rhythm, we anticipate the release of about two to four books per year. After being prepared, in 2012, the launch of the first “Portrait” is expected for the second quarter of 2013.

6. ACTIVITY AREAS, PROGRAMMES AND PERMANENT PROJECTS

The programmes consist of projects and activities grouped around themes in order to provide focus for a variety of efforts and to supply a consistent work basis for each area of public interest. The programmes include studies, research, conferences, editions, TV and DVD shows and other initiatives.

HEALTH PROGRAMME

The first two projects approved by FFMS dealt with health issues: Costs and Prices of Health (“Custos e preços da Saúde”) and Development in Infant Mortality (“Evolução da Mortalidade Infantil”). Following these, under the coordination of *José Mendes Ribeiro*, member of the FFMS Scientific Advisory Board, a project was carried out regarding Information on Health (“A informação em Saúde”) while a new major project is being prepared regarding Human Resources for Health (“Recursos Humanos em Saúde”).

**DID FAMILY
CHANGE DUE
TO THE
ECONOMICAL
CRISIS?**



1990/2011

Between 1990 and 2011, family was and still continues to be a pivotal value and, in Europe, there is convergence in this matter.
POP, Public Opinion Portal (www.pop.pt), commentary by Sofia Aboim

Individual responsibility shouldn't be an exclusive flagship for politicians. It should not emerge as opposed to the Welfare State.

Essay "Crisis, Family and Family Crisis", Mónica Leal da Silva.

In 2011, families with only two members correspond to 32% of the total. People living alone represent 21%.

PORDATA Portugal
(www.pordata.pt)

COSTS AND PRICES OF HEALTH

Undertaken by a team led by *Carlos Costa* of Escola Nacional de Saúde Pública da Universidade Nova de Lisboa (National School of Public Health of Lisbon's University Nova), this project is aimed at finding an answer to the following question: "Is it possible for health institutions in Portugal to change efficiency levels through their organisation, management and funding?". In 2012, three debate sessions were held with experts being organised around the following themes: "Primary Health Care", "Hospitals" and "Medicines". This debate cycle was concluded with a presentation entitled "Evolution, efficiency and sustainability in health". The dissemination of the findings will be completed by publishing the definitive version of the complete study.

DEVELOPMENTS IN INFANT MORTALITY

The study on the evolution of infant mortality in Portugal, which revealed a significant improvement over the past decades, was undertaken by *José Pedro Correia* and *Xavier Barreto*. Film director *Joana Pontes* (and producer *Patrícia Faria*) also carried out a film documentary "Born to live" already displayed in different ways, in particular on TV channels *SIC Notícias* and *SIC Mulher*.

INFORMATION ON HEALTH

This exploratory study, by author *Rita Espanha*, brings several themes together concerning information on health, providing a systematic approach for all the issues and sub-issues under its scope. The study's subject concerns examples of good-practices at the international level. The main goal is to create a consistent basis for systematic and action-oriented research about the importance, the development possibilities and the protocols regarding Information and Communication on Health. This study is concluded and is being disseminated on the internet.

HUMAN RESOURCES FOR HEALTH

In a system with a high degree of complexity that demands highly qualified resources, as is the Health Sector, the problem of the human resources allocated to its operation is fundamental. This matter is extremely complicated, bearing multiple issues and interactions, with a wide range of strands, which determine the effectiveness and efficiency of the health system and that are, simultaneously determined by same effectiveness and efficiency. An exploratory study is being prepared (by author *Paula Santana*) and we will possibly call for applications to carry out this study.

JUSTICE AND LAW PROGRAMME

The Justice and Law Programme is managed by *Nuno Garoupa*, a member of FFMS's Scientific Advisory Board (having *Maria Carlos Ferreira* as an Advisor).

LAW ASSESSMENT: A COMPARATIVE APPROACH

This project is led and undertaken by *João Caupers* and *Marta Tavares de Almeida* of Faculdade de Direito da Universidade Nova de Lisboa (Law Faculty of Lisbon's University Nova) and by *Pierre Guibentif* of ISCTE – Instituto Superior de Ciências do Trabalho e da Empresa (Higher Institute for Business and Labour Sciences). Initiated in February 2011, the project should be concluded within 2013.

The first field trips to the United-Kingdom, The Netherlands and Sweden have taken place. The team submitted summary reports regarding the fundamental principles governing legislative policy in such countries. Comments in respect to Switzerland and Germany shall also be included.

At this last stage, we are expecting a systematic analysis of multiple components in legislative drafting at the national level and that recommendations be developed.

LEGISLATIVE ASSESSMENT - CASE STUDIES

This project is coordinated by *Ricardo Gonçalves* of Faculdade de Economia e Gestão da UCP – Universidade Católica Portuguesa (Economy and Management Faculty of the Portuguese Catholic University) with the collaboration of *Álvaro Nascimento*, *Ana Lourenço*, *Sofia Nogueira da Silva* and *Vasco Rodrigues* (all of the UCP Economy and Management Faculty). The project is now concluded, generating monographs for publication, and was disseminated on the Internet. Several meetings for discussion and debate were carried out. The designated case studies are Law 37/2003, dated 22 August 2003 (also designated by “Higher Education Funding Law”) and Law 30/2000, dated 29 November (also designated by “Drug Law”). Debates and presentations were held at the European Monitoring Centre for Drugs and Drug Addiction and at the UCP Law Faculty of Oporto.

ECONOMIC JUSTICE

Prepared in the second semester of 2010, this project started in March 2011 and was completed by the end of 2012. In 2013, an extensive period has been reserved for the discussion and debate of the findings in this study, of its proposals and of the suggestions made by its authors. The project is the result of

**THE HEALTH
OF PORTUGUESE
PEOPLE?**

The background of the infographic is a light orange color with a faint, high-resolution image of a stethoscope. Overlaid on this are several colorful, semi-transparent geometric shapes, primarily triangles and polygons, in shades of red, orange, yellow, green, and blue. These shapes are interconnected by thin lines of the same colors, creating a network-like pattern. The text is contained within white rectangular boxes with thin black borders, some of which are partially covered by the geometric shapes.

384

Portugal is the 7rd country in the European Union with the highest number of physicians for each 100 thousand inhabitants.

PORDATA Europe (www.pordata.pt)

The efficiency of the health system resides in organization, involving mostly the management of hospitals and the policy of medical products. Frequently, excessive costs are due to deficiencies in primary health care.

Study "Costs and Prices of Health in Portugal", Carlos Costa, FFMS

Combination of potentially unlimited needs and scarcely available resources implies that not all the needs are necessarily fulfilled.

Magazine XXI, ter opinião (XXI, having an opinion), "Is rationing in health an inevitable reality?", Pedro Pita Barros and Bruno Martins, FFMS

cooperation between FFMS and ACL – Associação Comercial de Lisboa (Lisbon Commercial Association), who funded a major stake of the works. *Jorge Carvalho* of the Law Faculty at Universidade Nova de Lisboa (Lisbon's University Nova) was the executive leader for this project. A special Science and Coordination Commission was set up in which sit *Nuno Garoupa*, *Mariana Gouveia* (of Universidade Nova de Lisboa) and *Pedro Magalhães* (in FFMS's Scientific Advisory Board). A “monitoring commission” including representatives of FFMS and ACL was also activated.

The outcome of this project is an important sum of piecemeal and general studies, summaries, as well as a very significant cast of proposals and suggestions (see *Appendix 8*). The major part of these works will be published in book form and all of it will be available on the Internet. Multiple sessions and meetings were held to present the works and its outcome, attended by major Portuguese authorities, such as the President of the Portuguese Republic, the President of the Parliament, the Prime-Minister, the Minister of Justice, the President of the Supreme Court of Justice, the Attorney-General, the President of the Bar Association, and others. Until mid-2013, several sessions for debate and discussion will be held, in particular at law Faculties and Universities.

The priority goals of this project were: understanding the issues of Portuguese economic justice; assessing

possible solutions, studying the costs and benefits of existing alternatives; developing best practices using the examples of successful European experiences; promoting debate concerning a set of coherent and structural reforms. The results seem to have matched the goals. The set of measures suggested by the authors and undertakers of this project is so important that we could say this is a proposal in the nature of an overall reform. Such suggestions and proposals are certainly the outcome of reflection but also and mainly an analysis and a study of real experiences, of reality in other countries, or of observations and conclusions of empiric works carried out in close proximity to courts, law professionals and business people, performed with the valuable cooperation of INE- Instituto Nacional de Estatística (Statistics National Institute).

DEBATE ABOUT CONSTITUTIONAL REVISION

Assuming that, during the 2010 to 2014 legislature, a revision of the Constitution would take place, FFMS decided to prepare an e-book dedicated to this subject. The Editorial Board included four members in the FFMS's Scientific Advisory Board: *Nuno Garoupa* (coordinator), *José Tavares*, *Miguel Maduro* and *Pedro Magalhães*. This e-book is available on FFMS's pages on the Internet.

Later on, in order to renew and develop constitutional debate, FFMS decided to ask for a new contribution. Under the coordination of *Miguel Maduro*, a small task force was created and submitted a consistent revision project (different, in form and nature, from the proposals included in the e-book). Such a group was composed by: *Gonçalo Coelho*, *Guilherme Vasconcelos Vilaça*, *Jorge Fernandes* and *Tiago Fidalgo de Freitas*, of the European University Institute (in Florence) and *Pedro Caro de Sousa*, of the Oxford University. In due time, these projects will be published by FFMS.

JUDICIAL CONFIDENTIALITY

This was a small project undertaken by a Law professor at the Madrid Complutense University, *Fernando Gascón*. The results were presented over 2011 and the final version will be published on the Internet. The final report was debated with a panel of experts.

JUDICIAL BACKLOG

In 2012, it was decided to produce a brief study about Judicial Backlog in Europe. The purpose is to obtain as much data as possible about a dozen countries in order to draw up an overview of this phenomenon, which somehow reflects the efficiency

of courts and judicial systems. The work was entrusted to *Sofia Pires de Lima*, under the scientific guidance of *Nuno Garoupa*. This study has now been concluded and will be available to the public on the Internet in 2013. A workshop will be carried out in order to ponder the possibility of an in-depth study about Portugal and to produce recommendations and suggestions for improvement, in addition to discussing the causes of the current situation.

KEY ISSUES ON JUSTICE

These projects aim to stimulate public discussion about specific problems of Portuguese justice, including, whenever possible, a comparative analysis. Further steps should be taken, including the preparation of brief studies, workshop discussion with experts and the organization of major conferences. Several studies have been selected. *“Public Prosecution Offices in European Countries”*: a study about the career of public prosecutor in Europe, about the organisation of Public Prosecution Offices in Spain, Italy, France, Germany, Holland, United Kingdom and Scandinavian countries, as well as on the relations between the Attorney General and Public Prosecution Office with the executive power and the judicial power. The selected author is *José Martín Pastor*, from the University of Valencia. Another project consists on a study regarding “The training, selection, promotion and assessment of

**DOES JUSTICE
PROMOTE
ECONOMICAL
DEVELOPMENT?**



+317

In average, each additional procedural issue increases the duration of a legal procedure in an extra 317 days.

Consultation of judicial proceedings, an econometric analysis; Study "Economic Justice in Portugal"

Next to the economic crisis, companies select the slow pace of judicial decisions as the second major obstacle to its activities.

Survey to commercial companies in partnership with INE - Statistics National Institute; Study "Economic Justice in Portugal"

28%

of Portuguese people tend to trust in justice. Portugal is one of the European countries with less trust in justice.

POP, Public Opinion Portal (www.pop.pt)

judges in certain European countries: Spain, Italy, France, Germany and the United Kingdom, with lateral references to the Dutch and Scandinavian cases”. The author is *Carlos Gómez Ligerre*, from da Universitat Pompeu Fabra, in Barcelona.

Both studies shall be available for public consultation in 2013 and will be debated at meetings attended by experts.

INTERNET PORTAL: CITIZEN'S RIGHTS AND RESPONSIBILITIES

Under the management of *Nuno Coelho*, coordinating a vast team of experts (see *Appendix 11*), this project focuses on the citizen's rights and responsibilities. It aims to provide Portuguese society with reliable and practical means of information about the rights and responsibilities of each individual in the multiple situations of everyday life. It is not intended as a procedural guide, neither is it a reference book or a set of solutions that only professional practitioners are able to provide. This portal should be understood in its informative dimension towards an active and responsible citizenship. It is organised in the format of questions & answers grouped around major themes. The Portal will be made public in 2013.

EDUCATION PROGRAMME

The Education Programme is coordinated by *Carlos Fiolhais* assisted by *Mónica Vieira*. Last year's goals are maintained: to stimulate an educated debate about the problems of education in Portugal; to encourage the visit by international experts in order to compare the Portuguese reality with that of other countries; to contribute for the dissemination of recent science-based international studies; to promote development of documental, statistical and empirical studies about the Portuguese educational situation. The Education Board provided support to the Coordinator of this Programme (see *Appendix 12*).

CONFERENCES - CYCLE: KEY ISSUES ON EDUCATION

This cycle of conferences intends to generate debate about issues of general interest for the educational community, particularly teachers and students in the area of education, some of which will become teachers. The conferences were also attended by education scholars and other concerned parties.

The following themes were debated: “Student assessment” with the participation of *Jeffrey Karpicke*, *Hélder Sousa* and *Leandro Almeida*; “The new Schools” with *Margaret Raymond*, *Simon Steen* and *Alexandre Homem*

Cristo; and “The new Technologies” with *Jeroen van Merriënboer*, *Secundino Correia* and *João Paiva*.

Continuing last year’s model and aiming to promote discussion in different places of the country, said debates were held in Coimbra, Faro, Leiria, Lisbon (three events) and Oporto, in a total of seven events.

This cycle of conferences was publicised mainly via FFMS’s website with the collaboration of several entities: the Universities of Coimbra, Faro and Oporto; the Polytechnic Institute of Leiria; the Resources and Educational Technologies Team from the Ministry of Education and Science (ERTE – Equipa de Recursos e Tecnologias Educativas do Ministério da Educação e Ciência); Porto Editora, and also by a couple dozens of high schools and higher education institutions.

The Lisbon conferences were broadcasted by the Foundation’s website. Each conference was accompanied by a book including the speakers’ texts. One of such books included the findings of a study commissioned by FFMS concerning new models for school organisation and funding (by author *Alexandre Homem Cristo*). With such publications, the collection “Key Issues on Education” now includes 9 titles (see *Appendix 13*). In 2012, participants increased if compared to the year before, reaching the number of 1.861. The average number of live online viewers is of approximately 600 individuals.

EDUCATION STUDIES

In 2012, two studies were presented: the study entitled “Conceptual Exigency in Science in Basic Education”, which was coordinated by *Margarida Afonso* and was made public at the Beira Interior Training Centre for Teachers (Centro de Formação de Professores da Beira Interior), in Covilhã; and the study “The new Schools” by *Alexandre Homem Cristo*. Both studies were commissioned by FFMS and will be published in 2013. The first study dealt with characterising the level of conceptual exigency in science teaching in Basic Education, i.e. the level of cognitive requirements in the various components involved in teaching and learning scientific contents. The second study was basically informative, entailing a characterisation of options for school organisation in the United States of America, England, Holland and Sweden. A summary of this study was published in a book bearing the same title as the corresponding conference.

The following studies are currently on-going: “Teaching reading in the 1st Cycle of Basic Education: Teachers’ beliefs, knowledge and training”, by *João Lopes*; and “The classroom”, by *Maria Filomena Mónica*.

Certain higher education institutions were invited to tender for proposals in respect of other subjects of interest for FFMS: the organisation of exams, a comparative study between Portugal and other world countries; and the use

of Information and Communication Technologies in the classroom. In total, FFMS received twelve proposals and selected one concerning exams, which will start in 2013.

SCIENCE AND INNOVATION PROGRAMME

The Science Programme is directed by *Carlos Fiolhais*, who is assisted by *Mónica Vieira*. In 2012, the Science and Innovation Programme, newer than the Education Programme, was consolidated and received contributions from several meetings taking place within the year. In particular, we note the setting up of the Science and Innovation Council (see *Appendix 14*). The goal for this Programme is to better understand the efforts made in Portugal over the last years where science and technology are concerned, its effects in universities and polytechnic schools, its economical and social return and its socio-economical impact in the country. Thus, the objective is to study Portuguese technology and science policies over the last 30 years (1980-2010) and to carry out an analysis and a diagnosis for the current situation in the area, in order to develop general public opinion's perception of science, but also in order to provide a basis for comparison on an international scale, enabling the creation of the best public and private policies for the subject area. The programme is organised

around four themes: 1. Scientific research: organisation, operation and productivity; 2. The relation between Science and Higher Education; 3. Innovation and 4. Scientific Culture.

SCIENCE AND HIGHER EDUCATION

Within the scope of the theme "Relations between Science and Higher Education", FFMS and the University of Coimbra collaborated in order to host a private meeting, which took place at the university's premises, intended for selected invitees, including rectors, deputy-rectors and representatives of researchers and research fellows. This meeting was attended by the Secretary of State for Higher Education. A similar meeting is expected for 2013, regarding "Higher Education and Development", which will include polytechnic institutes, municipalities and commercial companies. Such activities will generate a report concerning "Science, Research and Higher Education", produced by interviewing consultants who well aware of Higher Education, as well as of its structures and research procedures.

STUDY ON SCIENCE AND INNOVATION

Within the scope of the "Innovation" theme, a study and a book are being prepared by *Manuel Mira Godinho*

from ISEG – Instituto Superior de Economia e Gestão da Universidade Técnica de Lisboa (Management and Economy Higher Institute of the Lisbon Technical University) on the subject of “Science and Innovation in Portugal”. It is meant for the general public and seeks to answer basic questions about the interaction between innovation, science and technology. This text will be published in 2013.

GPS – GLOBAL PORTUGUESE SCIENTISTS

Finally, there was a kick-off on reflection and preparatory work in order to create a network for Portuguese scientists abroad (GPS – Global Portuguese Scientists). A meeting was held with Portuguese scientists from all over the world and their associations, in particular with FIIP – Fórum Internacional de Investigadores Portugueses (International Forum of Portuguese Researchers), the Portuguese Association of Researchers and Students in the United Kingdom (PARSUK) and the Portuguese-American Post-Graduate Society (PAPS).

POPULATION AND DEMOGRAPHY PROGRAMME

This programme has been coordinated, since 2012, by *Maria João Valente Rosa* (in FFMS’s Scientific Advisory

Board and Manager of PORDATA). It focuses on social, economic and geographical issues and on how these relate to population movement and demographic development. Demographic change has been accelerating in Portugal over the last decades and there is need for an in-depth study on the implications of such changes and on how it will relate to social and economic issues.

Under the scope of the cooperation agreement between FFMS and the Ageing Institute of the University of Lisbon (Instituto de Envelhecimento da Universidade de Lisboa), two studies are underway: “Ageing processes: social implications” and “Dynamics and Ageing: diagnosis and projections”.

As a result of a partnership between FFMS and INE – Instituto Nacional de Estatística (Statistics National Institute), a new project concerning fertility in Portugal started in 2012 and we expect results for 2013 and 2014. FFMS (*Maria João Valente Rosa*) and INE share the scientific coordination of this project.

AGEING PROCESSES

This project developed the subject of the use of time and social networks. It is led by *Manuel Villaverde Cabral* science-wise and executed by *Mário Leston Bandeira*, both from the Instituto de Ciências Sociais da UL – Universidade de Lisboa (Social Sciences Institute of the

**LEARNING
IS NECESSARY.
BUT ISN'T IT
NECESSARY
TO ASSESS?**



21%

In Portugal, the number of young people (18-24 years) that did not graduate from secondary education and that are no longer in training is of 21%, almost the double of the European average (13%).

PORDATA Europe (www.pordata.pt)

Believing that exams are liable for deficient education is the easiest path.

Book "Student Assessment", text by Hélder Diniz de Sousa

"[...] a significant part of the students' lack of interest in learning and thus, an explaining factor for educational failure, is due to pedagogic and didactic tendencies consolidated within the past decades."

Essay "Teaching History", by Gabriel Mithá Ribeiro

University of Lisbon) within the scope of the UL Ageing Institute (Instituto de Envelhecimento da UL). This study is now over and will soon be published.

AGEING DYNAMICS

This project focused on the major demographic and social dynamics of ageing in Portugal. It is led by *Manuel Villaverde Cabral* science-wise and executed by *Mário Leston Bandeira*, both from the Instituto de Ciências Sociais da UL – Universidade de Lisboa (Social Sciences Institute of the University of Lisbon) within the scope of the UL Ageing Institute (Instituto de Envelhecimento da UL). This project will be concluded in 2013.

CONFERENCE ON POPULATION

As it had been previously announced, the Foundation organised this conference in 2012. It went through a name change and was designated Meeting the Present in the Future – The Portuguese people in 2030. The scientific coordination of the Meeting was entrusted to *Maria João Valente Rosa*. The Scientific Committee included: *Maria João Valente Rosa, José Tavares, Alda Carvalho, José Vítor Malheiros, Manuel Villaverde Cabral, João Ferrão, Carlos Pimenta, Alexandre Quintanilha, Paulo Chitas, Tiago Pitta e Cunha and Pedro Pita Barros*.

The Executive Committee included: *José Soares dos Santos, Susana Norton, Filipa Dias, Teresa Mourão-Ferreira, Joana Martins, João Fernandes* (from View), *Rui Pimentel, Pedro Castro* (from Multilem, the organising agency), *José Galamba de Oliveira* (from Accenture), *Graça Martins, Tiago Canas Mendes* (from the joint-venture O Escritório e Mola Ativism) and *José Alberto Carvalho* (from TVI).

The Meeting was held for two days, at the Belém Cultural Centre, in Lisbon, generating a great deal of attention, any available places being almost always sold out. It was permanently broadcasted via radio and television (with a particular note to TVI and Rádio Comercial). The debates were very lively. Given its dimension, visibility and nation-wide projection, this Meeting was a special milestone in FFMS's life, setting the pattern for our activities at a high level in respect to organisation, importance of selected themes, rigour in debates and quality of the attending speakers (see chapter 9 in this Report and *Appendix 15*).

THE SOCIAL ISSUE PROGRAMME

SOCIAL AND ECONOMIC INEQUALITIES IN PORTUGAL

This project was undertaken by *Carlos Farinha Rodrigues* of ISEG – Instituto Superior de Economia e Gestão da Universidade Técnica de Lisboa

(Management and Economy Higher Institute of the Lisbon Technical University) having *Anthony Atkinson* of Oxford University as Advisor and receiving the support of *José Tavares*, who seats in FFMS's Scientific and Cultural Advisory Board. It was carried out in 2010 and 2011 and its findings were made public and debated in 2011 and 2012. The study was published in 2012 and an up-date of its data is expected following new information by INE (Statistics Portugal).

A development of this work is being prepared, by way of an up-date to the data included therein and possibly by expanding the study to new tax data.

VALUES, ATTITUDES AND BEHAVIOURS

CULTURAL VALUES, ECONOMIC DEVELOPMENT AND THE QUALITY OF DEMOCRACY: A COMPARATIVE PERSPECTIVE

The study selected in 2011 and entitled "Cultural values, economic development and the quality of governance: a comparative perspective" by *Alejandro Portes* of Princeton University and *Margarida Marques* of Universidade Nova de Lisboa (Lisbon's University Nova) is in progress. The study has been monitored by *Pedro Magalhães* and *José Tavares*, members of FFMS's Scientific and Cultural Advisory Board. The field work is advancing

regularly and the reports have been delivered. We expect final results and the corresponding publications will be available by the end of 2013 or early in 2014 (to be followed, hopefully, by debates and public discussions).

SOCIAL VALUES AND CHANGE

The project regarding "Values and attitudes towards change in favour of a more sustainable development: the insight of businessmen, mayors and general population" started in 2012. The study is coordinated by *João Ferrão* of ICS - Instituto de Estudos Sociais da Universidade de Lisboa (Social Studies Institute of Lisbon's University) being monitored by *Pedro Magalhães* and *José Tavares* on FFMS's behalf.

The project is devised around 3 target-groups (businessmen, mayors and general population) and intends to pin-point social profiles that are adherent and have a pre-disposition towards change, in the course of more sustainable development.

The accumulation of operational failures in various public and private systems, accentuated by the recent economic and financial crisis, gave raise to prospective documents being drafted by international, European and national entities and *think-tanks*. Although different in nature and scope, all such documents underline the need for a transition towards new models of

**COULD
PORTUGAL
DIE FROM
OLD AGE?**



38 %

Between 2010 and 2030, the number of persons aged 50 years or more could represent about one half of Portuguese population. In 2010, it corresponds to 38%

Study "2030 and 2050 Demographic Projections",
by Maria João Valente Rosa and Maria Filomena Mendes,
FFMS

The main problem of modern society is not the future, it's the past.

Essay "The Ageing of Portuguese Society",
by Maria João Valente Rosa

In 1970, Portugal was one of the youngest among 15 European countries, whereas in 2011, it is already the sixth country with the most aged population, with 129 elderly persons for each 100 youngsters.

PORDATA Europe
(www.pordata.pt)

economic development and recognise that said transition will require deep cultural changes.

This project is structured in 3 main activities: A. Setting up a reference “Agenda for Transition” based upon a set of convergent and contrasting aspects selected from prospective documents, allowing to discover the predisposition level for change in the members of social groups towards a more sustainable development; B. Creating a multidisciplinary analytical chart, based upon transition into sustainability theories and upon social change theories, enabling to clarify the way in which the “cultural” dimension (values and attitudes) affects intensity, direction and governance styles, for suggested changes; C. Setting up a typology, based upon the findings of surveys carried out to businessmen, mayors and to Portuguese continental population, identifying the correlations between independent variables (for example, the level of adherence and predisposition for change) and dependent variables (for instance, structural social characteristics, attitudes and values of the respondents).

We expect the outcome of this project will deepen theoretical and empirical knowledge about the interaction between values and attitudes, governance ways and economic development and that it will also provide public and private decision-makers with useful information and that, moreover, it can contribute to

increase public awareness about the issues under analysis. This project includes a survey on opinions and attitudes by mayors and businessmen, which in Portugal is a relatively new feature in recent tradition for this type of studies. This project will be concluded in 2014.

DEVELOPMENT

THE CONTRIBUTION OF EU FUNDS FOR PORTUGUESE DEVELOPMENT SINCE 1985

This project is undertaken by the company AMA – Augusto Mateus Associados, having *Augusto Mateus* and *Paulo Madruga* as project’s leaders. It was initially focused on studying the contribution of EU funds in Portuguese development in the early decades after Portugal joined the European Union. After one year has elapsed, working and analysing interim reports, the goal was altered: it became broader and some new and possibly more interesting directions took over. Thus, the effects of Structural Funding remain an important theme for analysis but currently the central issue is that of the general and global consequences for Portugal in integrating the European Community and the European Union. The full participation of Portugal in the EU had very important consequences in a wide range of social areas, from economy to society, from institutions to demography.

As an outcome of this project, a set of indicators grouped around 50 themes will be available: “An overlook on the evolution of society, institutions and Economy in Portugal”, such as will be an analysis entitled “Portugal before and after Structural Funds: great impact and major issues”. The initial progress reports that have been presented are a very stimulating experience and allow for an innovative analysis of economy and society.

This study will be concluded in 2013 and a framework for its public debate is being prepared, which needs to rise up to the importance of the results. This is perhaps the most important observation of Portugal’s evolution in the last 30 years, after the process of joining the EU has begun.

PORTUGAL’S PARTICIPATION IN THE DECISIONS OF THE EUROPEAN UNION

This project is led by *Richard Rose* and *Alexander Trechsel* (both of the IUE – University Institute, in Florence) and intends to analyse and to assess Portuguese participation in European decisions (including the State and Public Institutions, as well as professional and private organisations). The aim is to devise what is the best method and how to achieve greater effectiveness for Portuguese participation in the processes of multinational decision making. This project is monitored, on

behalf of the FFMS, by *Miguel Maduro*, who is a member of its Scientific Advisory Board and by a Consulting Board specially set up for this purpose (*Miguel Maduro, José Tavares, Marina Costa Lobo, Pedro Magalhães, José Pena Amaral, Jorge Vasconcelos and Álvaro Mendonça e Moura*).

The Consulting Board already discussed the first 3 reports that were submitted: “The representation of small and average States in the EU”; “Portugal in the European Parliament”; and “Horizontal and vertical EU policymaking”.

There are several volumes expected for publication in 2013. By the end of this project, debate will be open to the concerned public.

LAND REGISTERS AND AGRICULTURAL PROPERTY IN PORTUGAL

This project is led by *Sarmiento de Beires* and aims at collecting and portraying the essential features of “Land Registers and Agricultural Property in Portugal”, demonstrating the interest and function of such a register and its utility for Portugal. Also, it will express the current status in this sector and, additionally, indicate how we could, or should, progress in order to improve under the current conditions. This work will be published in early 2013.

INVESTMENT IN INFRASTRUCTURES IN PORTUGAL

This project is led by *Alfredo Marvão Pereira*, it started in 2011 and by the end of 2012 it is at an advanced status of completion. This project's purpose is to study the economic effects of major public investment in infra-structures from 1974 to present-days. Three progress reports have been submitted and the project should be concluded within 2013.

7. PROJECT DEVELOPMENT

With the Foundation's new organisation, which will be in effect as from 2013, we expect to consolidate a method to select and develop projects that provides more logic and better articulation to our multiple range of activities. Until now, we have been regulated by principles of opportunity; from now on, we want to be more rational and sensible. FFMS's activity programme needs to comply with its Charter of Principles and its mission, but it should also be attentive to national and international realities bearing implications on Portuguese society.

Assuming that, as it goes in a promotional film for the Foundation, facts generate ideas and ideas will only contribute to develop society if they are discussed, the Foundation started by making facts available, in its first year of activity. PORDATA translates this first concern. In the following years, other actions have continued this line of action (Understanding the Crisis, Portal of Rights, Public Opinion Portal, etc.), but FFMS swiftly evolved into developing two other pillars in its operation – ideas and debate.

Databases were the first priority. Four years have elapsed and this activity has been translated into 3 internet sites and 5 databases (PORDATA – Portugal, Europe, Municipalities; Understanding the Crisis; POP, Public Opinion Portal). Bibliographies and Chronologies will add up to the latter, being available in 2013.

In parallel with facts and data, the Foundation started to pay attention to ideas, reflection and opinion. Thus, the studies and the undergoing projects were born, such as publications, in which “The Foundation’s Essays” occupy a special place. Within the scope of our studies, we reached very diverse areas, such as Education, Science, Labour, Economy, Demography, Society, Justice and the Welfare State.

Alongside with the Essays, the remainder Foundation’s publications are aimed at keeping public debate well alive and at feeding debate meetings. Accordingly, the idea of creating the magazine *XXI, Ter Opinião* (*XXI, Having an Opinion*) stemmed from the intent to reunite in a annual edition different contributions for the analysis of Portugal’s major problems, featuring in articles with an insightfulness that is not ensured by daily and weekly press. The edition of studies, either in printed or digital versions, is a part integral to the study projects.

Finally, documentaries for TV, cinema, DVD or any form of exhibition whatsoever (including Internet)

altogether form a new line of action we will be paying special attention to. This type of communication reaches out to a much wider public. We still need to determine whether this method is able to stimulate debate, as is FFMS’s primordial intent.

As previously announced (see previous Reports), this need to create and stimulate debate has been implemented in several ways. For instance, we launched over a dozen essays and other publications; we hosted two dozens of conferences included in the “Thinking about Portugal” cycle, in a partnership with *El Corte Inglés* (a dozen a year in 2011 and in 2012); the “Key Issues on Education” continued, with thematic conferences; we animated several debates in small circles and in a non-centralised mode.

As a final point, the first “Meeting in the Future” was the most important initiative in the field of debate organisation.

Over last year, FFMS consolidated its presence in Internet debating. Due to the Foundation’s internet site, it was possible to encourage debates concerning themes under study or regarding the subject of published books (Health, Education, Public Opinion, Economy, etc.). Audience and participation in these debates varies according to the theme and speakers, but hundreds of FFMS’s contents accounted over 1200 viewers. In some cases, debates were held over a week

**DOES THE SOCIAL
INTEGRATION
INCOME CUT
DOWN ON SOCIAL
INEQUALITIES?**



2010

Social policies for combating poverty and precarity are primarily responsible for the improvement of social equality. At the start of 2010s, the equality of household income has increased. Gender pay inequality did too.

Study "Economic Inequalities in Portugal",
Carlos Farinha Rodrigues, FFMS

Portugal is the 7th EU country with the highest inequality in income distribution.

PORDATA Europe (www.pordata.pt)

420.665

Number of beneficiaries of the Social Integration Income in 2012.

Internet Portal "Understanding the Crisis"
(www.conhecercrise.pt)

and it motivated participation and/or access by hundreds of individuals. We believe this road is very fertile and should be developed in the future. We are aware that we are exploring new ways of communication and a new debate method and that we still are inexperienced in it, but we are already sure these are the ways for the future.

In conclusion, the main concern in the development of FFMS's projects is to care for dissemination and public debate. A different problem is the selection of new projects for the future. The ongoing FFMS's reorganisation will demand refining the method towards a selection of themes and authors that further reveals a global vision of society, of national problems, of urgency in information and studies, and of the value that we expect contributions by FFMS will have.

8. COMMUNICATION, DISSEMINATION AND DEBATE

As referred above, the need to communicate and debate is at the core of the Foundation's mission. It is not just an extra feature for an initiative or a supplement for a project: those are fundamental moments or stages in the projects. As sophisticated as it may be, the outcome of investigation and research will have little use if locked away in the Foundation's archives or if reserved for academics. Only dissemination and debate will confirm the pertinence of a study and the usefulness of a given effort.

Specificity in communication and in debate methods is an interesting problem. Widespread dissemination and serious and plural discussion require debate techniques and methods that are adequate for such a purpose. It is well known that, in contemporary society, with its habits of entertainment and leisure, achieving results in the field of discussing ideas is not easy. Key media players are not always interested. The specialised character of many themes and problems does not help in dissemination. The "tribal" habits of academics and the hermetic language of many scholars are often actual obstacles to general understanding and discussion.

All of our projects have undergone several exploratory dissemination initiatives. But the innovative purpose of the Foundation, of its material and formats, requires us to question the impact of dissemination. After a public life of three years, we have realised that it is not sufficient to announce that information is available for journalists, decision-makers and information concerned parties. Thus, we believe the Foundation needs to choose its own ways for the dissemination and stimulation of debate: we won't think we can replace civil society, or imagine that civil society will meet whatever the Foundation's needs are, in order to liven up debate. Our hopes rely with several ongoing initiatives endeavouring to organise common actions with "debate societies", now burgeoning in Portugal, in particular at the Universities.

In addition to more traditional methods (books, debate meetings, launchings, Programmes and TV documentaries, conferences, etc.), the Foundation should specifically resort to Internet and digital means. We anticipate that in two to three years, the Foundation's internet site will be able to function as a true dissemination channel for contents and reasoned debate, strengthened

by the accumulation of material, by the production of formats and the specialisation in debate.

“MEETING THE PRESENT IN THE FUTURE: PORTUGUESE PEOPLE IN 2030”

In mid September 2012, the Foundation Francisco Manuel dos Santos organised, for the first time, a major conference dedicated to the subject “Population” assembling 1368 individuals, including more than sixty national and international speakers, in Lisbon, at the Belém Cultural Centre.

This conference, entitled “Meeting the Present in the Future: Portuguese people in 2030”, gathered concerned parties, curious people, national and international experts, in order to debate and envision perspectives about four themes , which shall be decisive over the next years: ageing and generation gap; family, work and fertility; inequalities: population settlement and resources; population fluxes and future prospects.

The conference “Meeting in the Future”, forecasted for a cycle of 3 years is the project that strategically makes the Foundation’s role more visible, as a driving force for free debates, clarification and enrichment of individuals and society.

The scientific coordination of this initiative was entrusted to *Maria João Valente Rosa*, who, in January 2012, created a Scientific Commission with the following members: *Alda Carvalho, Alexandre Quintanilha, João Ferrão, Jorge Macaísta Malheiros, José Tavares, José Vítor Malheiros, Manuel Villaverde Cabral, Paulo Chitas Pedro Pita Barros* and *Tiago Pitta e Cunha*.

The Executive Board included the following members: *José Soares dos Santos, Susana Norton, Filipa Dias, Rui Pimentel, Joana Lopes Martins, Teresa Mourão-Ferreira, Pedro Castro* (from Multilem), *João Galamba* (from Accenture), *João Fernandes* (from View), *Graça Martins and Tiago Canas Mendes* (from the joint-venture *O Escritório e Mola Ativism*) and *José Alberto Carvalho* (from the television channel TVI).

Several entities cooperated with FFMS in staging this meeting, including institutional partners, media (available *pro bono* in the conference’s organisation, broadcasting, dissemination and operation) and associated companies, intended for organisation, image and communication.

The publicity campaign for this initiative used several different means of dissemination, adding up to a total of 6,9 million contacts. Through broadcasting by TVI and TVI24 and by way of internet site www.

presentenofuturo.pt, this meeting reached over one million individuals.


At the meeting, a study by *Maria Filomena Mendes* and *Maria João Valente Rosa* was made public, projecting the Portuguese population in 2030. In the most likely scenario, in 18 years, Portugal could be an ageing country with a smaller population. The number of elderly individuals could be twice the number of young people and for each elderly person, only 2 individuals will be at an active age.

For future memory, we will publish a book where we will try to include the essentials of those two days. The debate about the population's future will be expanded to include some Portuguese municipalities, early in 2013, encouraging public debate about the issues subject to discussion back in September. Provision has been made for a video film in respect to demographic scenarios for 2030, which shall be the starting point in municipal debate, to be broadcasted by FFMS's online channels (See *Appendix 17* for the list of contributors and participants).

9. PROTOCOLS WITH OTHER INSTITUTIONS

In 2012, FFMS continued to follow the method of signing of protocols and agreements with other institutions (see *Appendix 18*).

**IS 2030
A FATALITY?**



“We are too many. And old. My siblings explain me that this is a disaster for the State’s accounts, for the future of our homeland and for the welfare of the generations to come. My argument is that such is due to the myth of eternal youth that is very popular nowadays, in an ever more teenager world, which is not very keen on making sacrifices and where optimism is relegated to believing that one’s life can be easier. It can’t.”

Meeting the Present in the Future (António Sousa Homem),
Francisco José Viegas

23%

The schooling level of employees, in Portugal, has been increasing within the past years. However, only 23% has a level of education corresponding to a full university course, against an average of 31% in EU 27.

PORDATA Europe
(www.pordata.pt)

“(…) The problem of “inland” is not a question of location but of conditions for development. On the other hand, “inland” territories are not homogeneous. Thus, we are in need of new concepts and innovative visions, in order to overcome the referred dichotomies: coastline vs. inland, and as to the latter, repopulation vs. abandonment”

Meeting the Present in the Future, João Ferrão

10. FINANCIAL REPORT

The following detailed financial statements reflect the Foundation's accounts. The funding commitments made by the founding family have been accomplished punctually.

By the end of 2012, FFMS's Board of Directors was informed of the imminent decision by the founding family consisting of an increase to FFMS's annual budget in the amount of two million Euros, to be added to the regular five million. The Foundation is honoured by the confidence translated by this gesture.

The Board of Directors remains faithful to a careful and conservative financial policy. This means the Board's efforts are directed at maintaining, and possibly increasing, the existing

reserves; that FFMS's reserves won't be utilised; that the maximum expense cap is set at the limit of FFMS's annual contributions and income; that income is retained for multi-annual projects so that FFMS does not run the risk of being short of means to honour its prior contracts; FFMS's staff and executives are in small number; and FFMS's investment policy is to engage only in safe applications, either with minimum or no-risk involved.

The distribution of expenditure by theme and function reveals somehow continuity in respect to options and methods (see *Appendix 18*).

11. COOPERATION WITH THE FOUNDER

The relationship with the founding family developed according to the tradition, that is, in the best possible way. In particular, the relationship with the Founder and Chairman of the Board of Trustees, *Alexandre Soares dos Santos*, has always been exemplary in cordiality and cooperation. The Board of Directors never sensed that its independence of judgement and actions were being questioned. The cooperation with the founding family has been fruitful. All financial issues, as referred above, have always been promptly resolved and dealt with.

12. PROSPECTS AND ACTIVITY PROGRAMME

We do not anticipate any major changes in the Foundation's activities. The mission and the statutory targets are clear, making it easy to comply with it. The members in FFMS's governing bodies and FFMS's main executive staff have not identified or suggested any changes to our orientation.

We expect, however, some changes regarding organisation and work methods. It is necessary to decentralize managerial responsibilities and to increase decisional autonomy for the people in charge. Currently, FFMS's projects are of such a dimension and in such a multiplicity of fields that it is no longer possible to have a centralised structure, almost "presidential".

Firstly, we are aware we may have embarked in too many initiatives. Almost fifty permanent and temporary projects are underway, a number definitively too big for our financial and human resources. But it is not only a question of resources. In fact, adopting an agricultural terminology, we could say that extensive culture excludes intensive culture. Meaning that, if we are involved in too many things and hold too many initiatives, at a certain point,

we may lack the sense of meaning and importance in what we do. For the next years, it shall be indispensable to limit the activities in which FFMS is involved at any given moment.

It is indispensable to reinforce the articulation and the coordination amongst programmes and activities. For several times within last year, there was an encroachment in activities. On the other hand, at the same time that decentralisation is reinforced, we will need to consolidate a strategic vision to be shared by all of our actions. Indeed, FFMS's projects are not to appear as isolated initiatives. In conclusion, decentralisation must walk side by side with coherence.

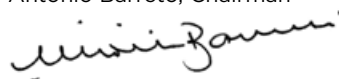
From the standpoint of activity planning, the reinforcement of financial strategy was considered necessary. In fact, we easily verified that some activities (in particular permanent projects, such as databases) include a massive surprise factor and easily generate unpredicted and unforeseen expenses. For instance, the maintenance of databases and electronic equipment is always more expensive than we can anticipate. Thus, all planning and budgets have been deeply revised for the next years. One of the conclusions hereto is supportive of our previous perception: to carry out fewer projects, but possibly deeper ones; to restrain our activities within reasonable limits, human and financial; and to be more attentive to expense effectiveness.

Over the next two years, we expect to consolidate FFMS's current activities and projects: to maintain the major databases, to carry out certain projects in a deeper way, rather than in a wider one, to reinforce the attention dedicated to organising public debates and disseminating studies and findings. Without questioning the seriousness of the work or the pertinence of the themes, communication and debate shall be the priorities for FFMS's activity, in the years ahead.


Lisbon, April 2nd, 2013.

The Board of Directors

António Barreto, Chairman



José Soares dos Santos, Member



José Quinta, Member



2.

FINANCIAL STATEMENTS

STATEMENT OF FINANCIAL POSITION (BALANCE SHEET)

REPORTING PERIOD ENDING ON 31ST DECEMBER 2012

Assets	Notes	2012	2011
Current Assets			
Stock	5	259.339,34	348.913,35
Clients		95.627,51	165.503,90
State and other Public Bodies		145.089,97	113.978,82
Other accounts receivable		13.427,22	8.264,66
Accrued Income		33.153,25	
Deferrals	12	89.948,05	0,00
Other financial assets	4	5.025.576,22	3.024.256,33
Cash and bank deposits	4	1.333.246,06	4.282.939,64
Total assets		6.995.407,62	7.943.856,70
Assets and Liabilities	Notes	2012	2011
Capital Funds			
Assets			
Founder's Endowments	10	1.000.000,00	1.000.000,00
Net Result for the financial year		0,00	0,00
Total Equity		1.000.000,00	1.000.000,00
Liabilities			
Current Liabilities			
Suppliers		1.031.905,33	855.137,28
State and other Public Bodies		66.121,80	35.182,50
Deferrals	12	4.668.599,58	5.845.021,05
Accrued Costs	13	228.780,91	208.515,87
Total Liabilities		5.995.407,62	6.943.856,70
Total Assets and Liabilities		6.995.407,62	7.943.856,70

Certified Accountant (nr. 45856)

The Board of Directors




PROFITS AND LOSSES ACCOUNT BY NATURE

REPORTING PERIOD ENDING ON 31ST DECEMBER 2012

Costs And Losses	Notes	2012	2011
Sales and Services Provided	6	308.297,83	250.460,90
Subsidies, donations and legacies	12	6.176.422,47	3.781.288,07
Raw materials and consumables used (cost of sales)	5	-537.498,62	-524.926,25
External Services and Supplies	15	-4.341.979,42	-2.607.626,76
Employees' Benefits	9	-608.710,15	-526.417,35
Provisions (increases/decreases)	7	-130.624,79	0,00
Fair value increases/decreases		1.712,69	24.256,79
Other Income and Gains	6	23.666,05	84.962,14
Other Costs and Losses	11	-884.886,66	-471.375,74
Income before depreciation, Financial charges and Tax		6.399,40	10.621,80
Expense/depreciation and amortisation reversals		0,00	0,00
Operating Result		6.399,40	10.621,80
Financial Income and similar gains		0,00	0,00
Interest payment and other costs		0,00	0,00
Result before tax		6.399,40	10.621,80
Deferred Taxes (for the period)	8	-6.399,40	-10.621,80
Net Income for the period		0,00	0,00

Certified Accountant (nr. 45856)

The Board of Directors




STATEMENT OF CASH FLOWS (DIRECT METHOD)

REPORTING PERIOD ENDING ON 31ST DECEMBER 2012

	2012	2011
Activities (1)		
Revenue from Clients	353.709,77	230.851,78
Payments to Suppliers	-1.356.036,22	-282.391,35
Payments to Employees	-323.384,39	-298.160,97
Tax:	-279.536,25	-278.531,68
Income Tax Retention		
Personal Income Tax (IRS) Category A	-139.300,00	-139.525,13
Personal Income Tax (IRS) Category B	-64.345,36	-63.897,43
Personal Income Tax (IRS) Category E	-6.851,93	-5.444,71
Social Security Contributions	-69.038,96	-69.664,41
Operational Activity Flows (1)	-1.605.247,09	-628.232,22
Investment Activities (2)		
Revenue from:		
Interest and Financial Investments	20.442,40	73.028,01
Payments referring to:		
Other funding activities (Projects)	-4.363.600,00	-2.562.463,00
Investment Activities Flows' (2)	-4.343.157,60	-2.489.434,99
Funding Activities (3)		
Donations	5.000.001,00	5.000.000,00
Funding Activities Flows' (3)	5.000.001,00	5.000.000,00
Net Cash and Cash Equivalent Variation (1+2+3)	-948.403,69	1.882.332,79
Cash and Cash Equivalent at the start of the period	7.307.225,97	5.424.893,18
Cash and Cash Equivalent at the end of the period	6.358.822,28	7.307.225,97

Certified Accountant (nr. 45856)

The Board of Directors




APPENDIX TO THE STATEMENT OF FINANCIAL POSITION AND TO THE PROFITS AND LOSSES ACCOUNT

REPORTING PERIOD ENDING ON 31ST DECEMBER 2012

(Amounts expressed in Euros)

1. INTRODUCTORY NOTE

The Francisco Manuel dos Santos Foundation (hereinafter referred to as the “Foundation” or as “FFMS”), is a non-profitable, private-law entity, incorporated on February, 12th, 2009, with unlimited duration by the company Francisco Manuel dos Santos, SGPS, S.A. (The Founder), having its registered head-offices located at Rua Tierno Galvan, parish of Santa Isabel, in the Lisbon district and in the Lisbon Municipality.

The Foundation was recognised by Order nr. 13591/2009, dated 5 June, 2009 and declared a private entity of public utility by Order nr. 5159/2010, dated 12 March 2010, both issued by the office of the Secretary of State for the Presidency of the Council of Ministers. On March 1st, 2012, the confirmation of the Foundation's public utility status was published in the Official Gazette (2nd series, number 43, section C)

and hereinafter the Foundation shall be regulated by the provisions of the Foundations Framework Law, approved by Law 24/2012, dated 9 July 2012.

The main purpose of the Foundation is to foster and increase the knowledge on Portuguese reality, in order to contribute for the development of society, the consolidation of citizens' rights and for the improvement of public institutions.

Within such scope, a range of studies are carried out, with a special focus on demography and population, social and economic conditions, social and economic development, health, education, professional training, social security, the State and democratic institutions, among others.

2. ACCOUNTING FRAMEWORK FOR THE PREPARATION OF THE FINANCIAL STATEMENTS

2.1 DISCLOSURE ON THE ACCOUNTING FRAMEWORK USED FOR THE PREPARATION OF THE FINANCIAL STATEMENTS

These financial statements have been prepared subject to the accounting and financial reporting framework (hereinafter referred to as “SNC”)¹, as set forth in Decree-Law nr. 158/2009 of 13 July 2009, according to the SNC applicable to non-profitable entities (hereinafter referred to as “ESNL”)², as approved by Decree-Law nr. 36-A/2011, of 9 March 2011.

We have applied the accounting and financial reporting standards (hereinafter referred to as “NCRF”)³ that are relevant for ESNL, in all matters pertaining to recognition, measuring and disclosure. However, in the event that the provisions of NCRF-ESCL are not adequate in respect of specific aspects in FFMS’s accounting and financial reporting of any transactions or situations, or if a given omission is so significant that it detracts from the purpose of rendering faithful and accurate information translating the financial position on a certain date

and the performance in the reporting period, FFMS will resort to, for the exclusive purposes of overcoming such an omission, to the supplementary provisions, indicated as follows, according to the corresponding order of prevalence:

- (i) NCRF and the interpretative provisions (hereinafter referred to as “NI”)⁴ of the SNC;
- (ii) International Accounting Standards (hereinafter referred to as “NIC”)⁵; and to
- (iii) International Accounting Standards (IAS) and international Financial Reporting Standards (hereinafter referred to as “IFRS”) and corresponding interpretations (SIC and IFRIC).

The following financial statements, which have been prepared on the basis of FFMS’s accounting records, have considered the following starting points:

Going Concern: These financial statements have been prepared based on the assumption that FFMS has the ability to continue in activity and operating as a going concern for a period of, at least but not limited to, twelve months, as from the date of the balance sheet.

1 SNC stands for “Sistema de Normalização Contabilística

2 ESNL stands for “Entidades do Sector Não Lucrativo”

3 NCRF stands for “Normas Contabilísticas e de Relato Financeiro”

4 NI stands for “Normas Interpretativas”

5 NIC stands for “Normas Internacionais de Contabilidade”

Accrual basis of accounting: The items are recorded as assets, liabilities, capital funds, income and costs when they satisfy the definitions and recognition criteria for those elements. Income and cost are recorded whenever they are respectively generated or incurred in, regardless of the date of the corresponding receipt of income or expense payment.

Consistency of presentation: FFMS shall retain the presentation and classification of any items included in the financial statements from one period to the next, unless:

- (i) it is apparent, following a significant change in the nature of the FFMS's operations that another presentation or classification would be more appropriate having regard to the criteria for the selection and application of accounting policies set forth in NCRF-ESNL; or
- (ii) NCRF-ESNL require a change in the presentation and, in any event only
- (iii) if the modified presentation provides reliable and more relevant information for these financial statements; and
- (iv) if the revised structure of the presentation is likely to continue, so that comparability is not impaired.

Offsetting: FFMS separately records both the assets and the liabilities, and the income and the expenses in the

corresponding items of the Statement of Financial Position (balance sheet) and of the Profit and Loss Account and, thus, there has been neither any offsetting of assets for liabilities nor any offsetting of costs for income.

Comparative information: In the event of any changes to the presentation or classification of items in its financial statements, the entity shall reclassify comparative amounts unless reclassification is impracticable and, thus the accounting policies and measuring criteria used for all amounts reported in the current period's financial statements are comparable to those used to prepare the disclosed comparative information.

2.2 INDICATION AND JUSTIFICATION FOR ANY EXCEPTIONAL DEVIATION FROM THE PROVISIONS IN THE SNC-ESNL AND OF THE CORRESPONDING EFFECTS IN THE FINANCIAL STATEMENTS, WHICH ARE REQUIRED TO PRODUCE A FAITHFUL AND ACCURATE REPRESENTATION OF FFMS'S ASSETS, LIABILITIES, INCOME AND EXPENSES.

In the preparation of these financial statements, there has been no deviation from the provisions in the SNC-ESNL and thus, said financial statements produce a faithful and accurate representation of FFMS's assets, liabilities, income and expenses.

2.3 INDICATION AND COMMENTS REGARDING THE ACCOUNTS IN THE STATEMENT OF FINANCIAL POSITION AND THE PROFIT AND LOSSES ACCOUNT WHOSE CONTENTS ARE NOT COMPARABLE TO THOSE OF THE LAST ANNUAL REPORTING PERIOD.

All the contents showing in the statement of financial position account and in the profit and losses account are comparable to those of the last annual reporting period.

2.4 FIRST-TIME ADOPTION OF “NCRF-ESNL”

For the purposes of complying with the commercial legislation in force, until December 31st, 2011, the Foundation's financial statements have been drafted, approved and published subject to the Portuguese Official Accountancy Plan and to the Guidelines issued by the Governmental Accounting Standards Board (“CNC – Comissão de Normalização Contabilística”). Thus, in the present financial statements and in order to maintain comparability with the 2011 amounts, the comparative carrying amounts for the last reporting period, i.e. 2011, have been restated by comparison to the amounts drafted and approved according to the previously existing accountancy standards. This procedure, however, did not have any impact in the presentation of the accounts.

3. PRESENTATION BASIS AND MAIN VALUATION CRITERIA

The main valuation criteria used in the preparation of these financial statements are as follows:

a) Financial Investments

Treasury Funds are recorded at their price of acquisition and at the end of each reporting period, we value the quote indicated by the bank.

b) Promoted Projects

The amounts shown in for the Promoted Projects, in particular in respect to PORDATA, Studies and Education Conferences, are recorded as expenses in the “Supplies and Services – Promoted Projects” item in the Profit and Loss Account by Nature, in respect to the reporting period when the later are executed, regardless of the actual reporting period in which the expense is made. Exception is made for Essays, Annual Magazine and Other Publications that are recorded in the stocks account (see note 5). When projects are attributed according to a multiannual basis, the corresponding costs are registered when the amount is actually paid up, according to the evolution and achievement stages for each project (see note 15).

c) Accruals and Deferrals

The difference between the amounts received and paid-up and the

corresponding income and expenses are recorded in the Accruals and Deferrals items.

d) Founder's Endowments

Founder's Endowments are recorded as equity capital on the date of confirmation of such endowments, regardless of the latter being actually received on same date (see note 10).

e) Donations

Contributions received to pay for project expenses or for FFMS's operating costs are recorded in the "Donations" item and are charged to results, in the exact measure of the needs required to cover for the costs incurred in for each reporting period (see note 13).

4. CASH FLOWS AND FINANCIAL INVESTMENTS

In respect to the Statement of Cash-flows, the amount recorded as Cash and Cash Equivalent by the end of the reporting period breaks down as follows:

	2012	2011
Cash	4.960,26	2.824,97
Bank Deposits	1.328.285,80	4.280.144,67
Total	1.333.246,06	4.282.969,64

As at 31st December 2012, FFMS's Financial Investments portfolio included:

	Quantity	Quoted market prices
Treasury Funds	7.574	5.025.576,22

5. STOCKS

The movements in the stocks item are as follows:

MOVEMENTS FOR THE REPORTING PERIOD

Items	Opening Balance	Increase	Decrease	Final Balance
Stocks:				
Inventory - Essays	268.792,62	286.469,20	318.761,60	236.500,22
Inventory - Annual Magazine	80.120,73	200.145,82	269.609,47	10.657,08
Inventory - Other Publications	0,00	64.313,10	52.131,06	12.182,04
Total	348.913,35	550.928,12	640.502,13	259.339,34

The final balance in the “Inventory - Essays” item includes:

Items	Final Balance
Foundation Stock	201.583,22
Consignment Stock	34.917,00
Total	236.500,22

The final balance in the “Inventory - Annual Magazine” item includes:

Items	Final Balance
Foundation Stock	10.547,50
Consignment Stock	109,58
Total	10.657,08

The final balance of the “Inventory - Other Publications” item includes:

Items	Final Balance
Foundation Stock	12.182,04
Consignment Stock	0,00
Total	12.182,04

The cost of goods sold, in the amount of 537.498,62 Euros, corresponding to Essays, Annual Magazine and other Publications, was calculated as follows:

MOVEMENTS FOR THE REPORTING PERIOD

Items – Essays	Stock
Opening Stocks	268.792,62
Purchases	209.337,93
Adjustment for inventory clearance	0,00
Closing Stocks	-236.500,22
Cost for the fiscal year	241.630,33

MOVEMENTS FOR THE REPORTING PERIOD

Items – Annual Magazine	Stock
Opening Stocks	80.120,73
Purchases	189.624,11
Adjustment for inventory clearance	0,00
Closing Stocks	-10.657,08
Cost for the fiscal year	259.087,76

MOVEMENTS FOR THE REPORTING PERIOD

Items – Other Publications	Stock
Opening Stocks	0,00
Purchases	48.962,57
Adjustment for inventory clearance	0,00
Closing Stocks	-12.182,04
Cost for the fiscal year	36.780,53

The valuation of inventories is recorded at cost value.

6. REVENUE

Revenue breaks down as follows:

	2012	2011
Sales of Essays	39.364,93	250.274,46
Sales of Annual Magazines	31.459,52	186,44
Sales of Other publications	15.910,54	0,00
Provision of Services - Meeting in the Future Event	18.310,80	0,00
Provision of Services - Study on Economic Justice	203.252,04	0,00
Sub-total	308.297,83	250.460,90
Other forms of Revenue	23.666,05	109.218,93
Total	331.963,88	359.679,83

Revenue is recorded at the fair value of the consideration received. The revenue for the Study on Economic Justice refers to the contribution received from ACL to carry out this work.

The item "Other forms of Revenue" refers to interest gained in treasury funds and bank deposits.

7. IMPAIRMENT LOSSES

This item breaks down as follows:

	2012	2011
Impairment Losses		
Clients	130.624,79	0,00
Total	130.624,79	0,00

An Impairment Loss was recorded as debt to be received from the Client "G.C.E. - Sodilivros - Sociedade Distribuidora de Livros e Publicações, S.A." given the fact that such company

filed for insolvency procedures, according to Notice nr. 9955/2012, published in the Official Gazette (2nd Series) nr. 89, dated 8 May 2012.

8. INCOME TAX

This item breaks down as follows:

	2012	2011
Current Tax	6.399,40	10.621,80
Deferred tax	0,00	0,00
Total	6.399,40	10.621,80

Additional Information

According to the Order of the Presidency of The Council Of Ministers, dated 12 March 2010, the Foundation is a legal person with public utility status and thus the exemption provided for in Article 10, Section 1, Line c) of the Corporate Income Tax Code ("Código do IRC") is applicable.

In accordance with the legislation in force, tax returns are subject to revision

and correction by tax authorities for a period of four years (or of five years for Social Security Authorities, as from 2011). For this reason, FFMS's tax return for 2012 may be subject to revision. However, the Board of Directors understands that possible corrections to be included as a result of any revisions and/or inspections by the authorities shall not have significant impact in the present financial statements.

9. EMPLOYEES' BENEFITS

This item breaks down as follows:

	2012	2011
Remuneration assigned to the Governing Bodies	249.999,96	249.999,96
Salaries of Personnel	262.936,00	177.022,37
Attendance Fees	26.000,00	38.546,50
Social Charges	65.932,87	60.848,52
Insurance for accidents at work and occupational diseases	3.841,32	
Total	608.710,15	526.417,35

The Human Resources Establishment Plan of FFMS includes 9 employees, with the following positions: Chairman of the Board of Directors, Personal Assistant to the Executive Directors, Communication and Marketing Manager, Database Manager, Administrative Coordinator for Non-Permanent Projects and five Project Assistants. The increase showing in

the item “Salaries of Personnel” if compared to the same period in 2011 is a consequence of having employed four Assistants, which were previously working for FFMS as Service Providers.

The Remuneration assigned to the Members of the Scientific and Cultural Board and to the Members of the Board of Trustees in 2012 was as follows:

	2012	2011
Scientific and Cultural Board – Attendance Fees	3.500,00	4.046,50
Board of Trustees – Attendance Fees	22.500,00	34.500,00
Total	26.000,00	38.546,50

10. CAPITAL PAYMENT (ENDOWMENT) AND VARIATION

The endowment in the amount of 1.000.000,00 Euros was fully paid in during the fiscal year of 2009.

In this reporting period, there were no movements in the “Capital Funds” item, as shown in the following table:

MOVIMENTOS DO EXERCÍCIO

Items	Opening balance	Increase	Decrease	Final Balance
Founder’s endowment	1.000.000,00	0,00	0,00	1.000.000,00
Net Income for the Period	0,00	0,00	0,00	0,00
Total	1.000.000,00	0,00	0,00	1.000.000,00

11. OTHER COSTS AND LOSSES

This item breaks down as follows:

	2012	2011
Other costs and losses		
Indirect Taxes – TVA	822.421,01	451.940,70
ACL	58.495,01	0,00
Other costs and losses	3.970,64	19.435,04
Total	884.886,66	471.375,74

The amount recorded in the ACL item refers to a correction made in respect to the income recorded in the previous fiscal year within the scope of the

Agreement executed between FFMS and the Lisbon Commercial Association (“ACL – Associação Comercial de Lisboa”).

12. DEFERRALS

This item breaks down as follows:

	2012	2011
Assets		
Costs to be recognised - Projects	89.948,05	8.264,66
Total	89.948,05	8.264,66
Liabilities		
Donations	4.668.599,58	5.845.021,05
Total	4.668.599,58	5.845.021,05

The amount recorded in the “Costs to be recognised” item refers to payments made in advance regarding services to be provided in 2013, for the maintenance and development of PORDATA.

The amount recorded in the “Donations” item refers to the amount of the contributions granted by the Founder (Sociedade Francisco Manuel dos Santos) that is yet to be spent in funding FFMS’s activity (project related expenses and FFMS’s operating costs).

The recognition of these contributions for the income of the reporting period will be made for the exact amounts of the said expenses, to the extent that such expenses are not covered

by financial income. For this reporting period, the income was charged with the amount of 6.176.422,47 Euros (“Other Revenue and Income – Donations” item).

13. ACCRUED EXPENSES

This item breaks down as follows:

	2012	2011
Liabilities		
Salaries to be paid	43.174,08	28.631,27
Independent service providers – Social Security	24.751,83	16.083,17
Remuneration of Governing Bodies	108.375,00	66.937,50
Other accrued expenses	52.480,00	96.863,93
Total	228.780,91	208.515,87

The amount of 43.174,08 Euros recorded in the “Salaries to be paid” item refers to holyday pay and additional holyday bonus to be paid in 2013, in respect to the employees’ right to receive holyday pay and an additional holyday bonus that has matured in 2012.

The amount of 108.375,00 Euros is an estimate for the Remuneration of FFMS’s Governing Bodies to be paid in 2013.

The item “Other accrued expenses” includes the amount of 5.727,25 Euros, which is an estimate for the price of services to be provided by suppliers (Essays/PORDATA) in 2013, and the amount of 46.752,75 Euros, which is an estimate of the amount to be paid as bonuses relating to 2012 that are to be paid in 2013.

14. PROMOTED PROJECTS

Until the end of the reporting period, the following projects were approved and their costs recorded as follows:

Projects	Approved Amounts			Amounts Spent		
	2009/2010/ /2011	2012	total	2009/2010/ /2011	2012	total
PORDATA	2.122.200,00	748.400,00	2.870.600,00	1.425.100,00	715.500,00	2.140.600,00
Essays/Magazines	1.253.200,00	126.600,00	1.379.800,00	856.000,00	668.100,00	1.524.100,00
Studies	2.758.900,00	597.100,00	3.356.000,00	1.069.000,00	939.100,00	2.008.100,00
Education Programmes	331.300,00	120.000,00	451.300,00	308.100,00	145.400,00	453.500,00
Communication	233.300,00	260.700,00	494.000,00	211.700,00	133.000,00	344.700,00
Other Projects	171.300,00	0,00	171.300,00	136.800,00	116.300,00	253.100,00
Conference on Population (Meeting)	0,00	1.750.900,00	1.750.900,00	0,00	1.743.500,00	1.743.500,00
Total	6.870.200,00	3.603.700,00	10.473.900,00	4.006.700,00	4.460.900,00	8.467.600,00
Amount to be Retained						2.006.300,00

In the first three reporting periods (2009/2010/2011), the amounts approved for Annual Projects and Multi-Annual Projects totalled 6.870.200,00 Euros; in 2012, said amount is of 3.603.700,00 Euros, which corresponds to an aggregate amount of 10.473.900,00 Euros, as from the incorporation of FFMS, of which 8.467.600,00 Euros have already been paid up, in addition to 1.464.435,80 Euros for VAT (of which 822.421,00 Euros refer to 2012).

Additional Information

In the Statement of Profits and Losses Account by Nature, the costs of all projects (except for “Essays”, “Annual Magazine” and “Other Publications”), are recorded under the “Supplies and External Services” item, excluding the VAT amount. The costs regarding “Essays”, “Annual Magazine” and “Other Publications” are recorded under the “materials” item, with VAT deducted, since it VAT is paid on the sale of such products.

Regarding the amount to be retained, of 2.006.300,00 Euros, in respect

to Projects approved with a Capital Spending Proposal (CSP), a surplus amount of 6.358.822,00 Euros is

available, which has been invested in bonds and in term bank deposits.

AGGREGATE AMOUNTS 2009/2010/2011/2012

	Amount
Projects approved with CSP	10.473.900,00
Amount spent	-8.467.600,00
Amount to be retained	2.006.300,00
Surplus available as at 31.12.2012	
Term deposits	1.333.246,00
Financial Investments	5.025.576,00
Total	6.358.822,00

15. EXTERNAL SERVICES AND SUPPLIES

This item breaks down as follows:

Designation	Amount
Specialised Services:	
Promoted Projects	3.808.462,85
Legal counselling	20.280,00
Accounting Consultancy	11.295,00
Auditing Services	6.500,00
Leases and Rentals costs	12.816,67
Travelling Expenses	16.576,78
Representation Costs	13.227,51
Scientific Advisory Board and Editorial Board - Fees	206.008,35
Employees - Training and monitoring - Fees	190.382,12
Communication	14.901,44
Books, Technical Documentation and office supplies	9.261,89
Gifts	25.991,95
Other items	6.274,86
Total	4.341.979,42

16. DISCLOSURES REQUIRED BY ADDITIONAL LEGAL REGULATIONS

The remuneration paid to the Certified Auditor amounted to 9.500,00 Euros and reports to the 2nd semester in 2011 and to the 2012 reporting period.

Certified Accountant (nr. 45856)



17. EVENTS AFTER THE BALANCE SHEET DATE

Until the date of completion of this report, there have been no material post balance sheet events which could require disclosure or adjustment to the financial statements, as at 31 December 2012.

The Board of Directors





Rua Fradesso da Silveira, 6, 3º A
Complexo Alcântara Rio, Bloco C
1300-609 Lisboa
PORTUGAL
Tel.: +351 213 602 500
Fax: +351 213 602 501
auren.lisboa@auren.pt

CERTIFICATION OF ACCOUNTS

Introduction

1. We have examined the attached financial statements of the **Francisco Manuel dos Santos Foundation**, which comprise the Statement of Financial Position as at the 31st December 2012 (showing a total of Euros 6.995.407,62 and a total of shareholder's equity of Euros 1.000.000,00, including a null asset variation), the Profit and Loss Account and corresponding Appendix for the financial year ended on that date.

Responsibilities

2. It is the Board of Directors' responsibility to prepare financial statements that present a true and appropriate view of the financial position of the Foundation, the asset variation, as well as the adoption of adequate accounting policies and criteria, and the maintenance of a suitable system of internal control.
3. Our responsibility consists of expressing a professional and independent opinion, based on our audit of such financial statements.

Scope

4. Our audit was conducted in accordance with the Standards and Technical Guidelines of the Certified Auditors' Association, which require that the audit be planned and executed with the purpose of obtaining an acceptable level of assurance as to whether the financial statements are free from any materially relevant distortions. To that effect, our audit included: i) a sample verification of the evidence supporting the amounts and disclosures contained in the financial statements and an evaluation of the estimates, based on judgements and criteria established by the Board of Directors, used in its preparation; ii) assessment of the adequacy of the adopted accounting policies and disclosures, taking the circumstances into account; iii) verification of the applicability of the continuity principle; and iv) appraisal of the overall adequacy in the presentation the financial statements.
5. We believe that our audit provides a reasonable basis for expressing our opinion regarding those financial statements.

Opinion

6. In our opinion, the above-referred financial statements adequately represent, in all relevant aspects, the financial position of the **Francisco Manuel dos Santos Foundation**, as at 31st December 2012, and the results of its operation for the fiscal year then ended, in accordance with the accounting principles generally accepted in Portugal.

Lisbon, March 4th, 2013.

AUREN Auditores & Associados, SROC, S. A.

Represented by:

Victor Manuel Leitão Ladeiro, Certified Auditor (R.O.C) nr. 651



**REPORT AND OPINION
OF THE AUDIT COMMITTEE**

To the Board of Trustees

In compliance with the statutory provisions, and in the exercise of our capabilities, we are herewith submitting the Report on our supervisory activity and our Opinion concerning all accounting documentation presented by the Board of Directors of the Francisco Manuel dos Santos Foundation (hereinafter referred to as the Foundation), with regard to the fiscal year ending on the 31st December 2012.

We surveyed the evolution of the Foundation's activity, verifying the accounting records and supporting documents, having obtained from the Board, at all times, all documents, clarification and information requested.

We ascertained that the financial statements included in the relevant accounting documents were prepared in accordance with the accounting principles generally accepted in Portugal and complied with the adopted legal provisions, thus expressing the accurate financial situation of the Foundation.

We emphasise that the Opinion of this Audit Committee is supported by the viewpoint (attached), regarding the aforementioned financial statements, expressed by the Member of AUREN Auditores & Associados, SROC, S.A., as a result of the task assigned to him, in view of his technical expertise.

We, therefore, are of the opinion that the Activities Report issued by the Board of Directors and the accounting documents concerning the fiscal year ending on the 31st December 2011 be approved.

Lisbon, 26th March 2012

THE AUDIT COMMITTEE

Chairman
Dr. José Luís Nogueira de Brito

Member
Dr. Luís Maria Viana Palha da Silva

Member
AUREN Auditores & Associados, SROC, S. A.
Represented by: Dr. Victor Manuel Leitão Ladeiro, Certified Auditor (R.O.C) nr. 651

3.

APPENDIXES

APPENDIX 1. CHARTER OF PRINCIPLES

*FFMS's constitutional text approved in 2009
by the Board of Trustees*

The Francisco Manuel dos Santos Foundation (hereinafter FFMS) intends to ponder, study and to contribute to a better understanding of Portuguese reality. FFMS aims to collaborate in the effort to solve problems faced by society, for the benefit of Portuguese people and of the generations to come.

In order to achieve such a goal, FFMS shall promote the execution of studies, research works and further initiatives, which by complying with the highest standards of rigour and quality, should enable a better understanding of reality, offer concrete solutions and recommendations to decision-makers, lead to a meaningful debate regarding major national problems and contribute to greater justice, development and to reinforce social cohesion.

FFMS's activity shall be guided by the principles of personal dignity and social solidarity and by the values of democracy, freedom, equal opportunities, merit and pluralism.

FFMS's shall act with absolute independence regarding all powers,

public and private, ideologies, currents of opinion, philosophical tendencies, creeds and religious denominations. FFMS's governing bodies shall ensure compliance with its statutory provisions, notably its independence.

FFMS deems it is essential to promote a more active involvement of civil society in reflecting and solving national problems and thus it shall endeavour its best efforts so that citizens are widely aware of its projects and initiatives. In this line, FFMS shall seek to provide Portuguese society with clear, objective and accurate information concerning the findings of its activities, as well as it shall ensure the utmost transparency in respect to its organisation, aims, funding sources and activities.

FFMS believes that holding broad-based, pluralistic and public debates regarding its recommendations is just as important an aim as is carrying out studies and investigation works.

In its activities, FFMS shall seek to be faithful in its commitment to social responsibility, which constitutes FFMS's mission, as defined by the Founders.

APPENDIX 2. ORGANISATION, POSITIONS AND DUTIES

Board of Directors

Chairman, *António Barreto*

Member, Communication, Dissemination and
Finance, *José Soares dos Santos*

Member, Administration, Litigation,
Recruitment and Accounting, *José Quinta*
Assistant and Secretary, *Isabel Bernardes*

Departments

Project Manager, *Isabel Vasconcelos*
Communications Manager, *Filipa Dias*
Operations Manager, *Susana Norton*
Information Technology Manager,
Santiago Olmedo

Information Technology Coordinator,
Rui Pimentel

Advisor for Litigation and for the Justice and
Law Programme, *Maria Carlos Ferreira*

Advisor for the Education, Science and
Innovation Programme, *Mónica Vieira*

Operations Coordinator for “Meeting in
the Future” and Debate Organisation,
Teresa Mourão-Ferreira

Health Programme Assistant,
Susana Casanova

Assistant, *Cristina Cabral*

Permanent Programmes

Publications, *António Araújo*

PORDATA, *Maria João Valente Rosa*,
Ana Luísa Barbosa, *Joana Lopes*
Martins, *Rita Rosado*, *Bernardo Gaivão*,
Miguel Viana

Themes by subject

Education, *Carlos Fiolhais*, *Mónica Vieira*

Science *Carlos Fiolhais*, *Mónica Vieira*

Health, *José Mendes Ribeiro*

Justice and Law, *Nuno Garoupa*

Maria Carlos Ferreira

Population and Demography, *Maria João*
Valente Rosa

External Contributors

Legal counsel and legal audit, *Tiago Lemos*
and *Marta Leitão*

Accounting – AUREN, *Rute Serras (TOC*
– Certified Accountant), *Vítor Ladeiro*
(ROC – Certified Auditor)

APPENDIX 3. GOVERNING BODIES

Board of Trustees

Alexandre Soares Santos, Chairman

António Araújo

Carlos Moreira da Silva

Isabel Jonet

João Lobo Antunes

Joaquim Gomes Canotilho

Luís Valente de Oliveira

Manuel Braga da Cruz

Manuel Clemente

Raul Miguel Rosado Fernandes

Vasco dos Santos

Audit Committee

José Luís Nogueira de Brito, Chairman

Luís Palha

External Auditor (Vitor Ladeiro, AUREN)

Salaries Commission

Alexandre Soares Santos, Chairman

Luís Valente de Oliveira

Isabel Jonet

Board of Directors

António Barreto, Chairman

José Soares dos Santos

José Quinta

Scientific and Cultural Advisory Board (non-statutory)

Carlos Fiolhais

Francisco Sarsfield Cabral

José Amaral

José Mendes Ribeiro

José Tavares

Maria de Fátima Bonifácio

Maria João Valente Rosa

Miguel Poiares Maduro

Pedro Magalhães

Nuno Garoupa

Paulo Rosado

APPENDIX 4. DECLARATION OF PUBLIC INTEREST



PRESIDÊNCIA DO CONSELHO DE MINISTROS
Gabinete do Secretário de Estado da Presidência do Conselho de Ministros

Despacho

Declaração de Utilidade Pública

A Fundação Francisco Manuel dos Santos, pessoa colectiva de direito privado n.º 508867380, com sede em Lisboa,

Promove e aprofunda o conhecimento da realidade portuguesa, procurando desse modo contribuir para o desenvolvimento da sociedade, o reforço dos direitos dos cidadãos e a melhoria das instituições públicas, através da elaboração de estudos sobre temas seleccionados, publicando os resultados no site Prodata, formulando recomendações e fomentando a discussão pública sobre as matérias que são objecto dos trabalhos, com especial relevo nas áreas da demografia e da população, condições sociais e económicas, desenvolvimento económico e social, saúde, educação, formação profissional, segurança social, Estado, identidade nacional, administração pública, direitos e deveres dos cidadãos, cidadania e instituições democráticas, relações laborais, organização do território, as cidades, a questão social, coesão social, desigualdades e conflito, justiça, políticas económicas e sociais, as instituições públicas, os grandes serviços públicos, as relações entre o Estado e os cidadãos, acesso à cultura, informação e comunicação social.

Instituída e reconhecida há cerca de um ano, a Fundação Francisco Manuel dos Santos prossegue, assim, fins de interesse geral e desenvolve, sem fins lucrativos, a sua intervenção em favor da comunidade em áreas de relevo social.

Tratando-se de uma fundação, não tem aplicação o prazo de três anos previsto no n.º 2 do artigo 4.º do Decreto-Lei n.º 460/77, de 7 de Novembro, com a redacção dada pelo Decreto-Lei n.º 391/2007, de 13 de Dezembro, o qual podia, no entanto, ser dispensado visto estarem reunidas as condições das alíneas a) e b) do n.º 3 do mesmo artigo.

Por estes fundamentos, conforme exposto na informação final do processo administrativo n.º 132/UP/2009 instruído na Secretaria-Geral da Presidência do Conselho da Ministros, e no uso dos poderes que me foram subdelegados pelo Ministro da Presidência através do Despacho n.º 4213/2010, de 26 de Fevereiro, publicado no Diário da República, 2.ª série, n.º 48, de 10 de Março de 2010, declaro a Fundação Francisco Manuel dos Santos pessoa colectiva de utilidade pública, nos termos do Decreto-Lei n.º 460/77, de 7 de Novembro, com a redacção dada pelo Decreto-Lei n.º 391/2007, de 13 de Dezembro.

Presidência do Conselho de Ministros, 12 de Março de 2010

O Secretário de Estado da Presidência do Conselho de Ministros


João Tiago Valente Almeida da Silveira

(Translation)



PRESIDENCY OF THE COUNCIL OF MINISTERS

Office of the Secretary of State for the Presidency of the Council of Ministers

DISPATCH

Declaration of Public Interest

The **Francisco Manuel dos Santos Foundation** is private institution number 508 867 380, with registered offices in Lisbon.

It promotes and extends knowledge of contemporary Portugal, thus contributing to the development of society, the consolidation of the citizens' rights and the improvement of public institutions. These goals are pursued through the studies carried out on selected themes, the publication of research findings on the PORDATA website, the issuing of recommendations, and the encouragement of public debate on the matters under study, especially in the areas of demography and population, social and economic conditions, social and economic development, health, education, professional training, social security, State, national identity, public administration, citizens' rights and duties, citizenship and democratic institutions, work relations, spatial planning, urban issues, social problems, social cohesion, inequalities and conflict, justice, economic and social policies, public institutions, main public services, relationship between the State and the citizens, access to culture, information and the media.

Created and recognised approximately one year ago, the Francisco Manuel dos Santos Foundation pursues non-profitable, socially important activities in order to achieve specific goals that are in the interest of the community as a whole.

Being a foundation, the three-year period referred to in Article 4, Section 2 of Decree-Law nr. 460/77, dated 7 November 1977 (as amended by Decree-Law nr. 391/2007, dated 13 December 2007) is not applicable. It must be pointed out however, that the referred time period could also be waived based upon the provisions of lines a) and b), Section 3, of said Article 4.

For these reasons, as it is stated in the conclusions of administrative procedure nr. 132/UP/2009 instructed in the Secretariat-General of the Presidency of the Council of Ministers, and in the use of the authority sub-delegated to me by the Minister of the Presidency through Dispatch nr. 4213/2010 of 26th February, published in the Official Gazette, 2nd series, nr. 48, of 10th March 2010, I hereby declare the Francisco Manuel dos Santos Foundation a private institution of public interest, under the provisions of Decree-Law nr. 460/77, dated 7th November 1977 (as amended by Decree-Law nr. 391/2007, dated 13th December 2007).

The Presidency of the Council of Ministers, 12th March 2010.

The Secretary of State for the Presidency of the of the Council of Ministers

João Tiago Valente Almeida da Silveira

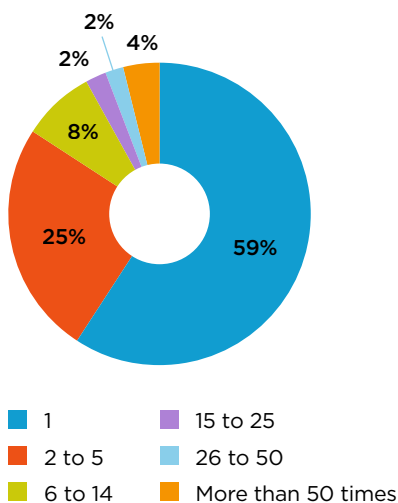
APPENDIX 5. PORDATA'S INDICATORS

In 2012, PORDATA was visited over 650 thousands times. Over 5 million pages were consulted within this year and the average time per visit exceeded 6 minutes. PORDATA accounted for approximately 500 thousand individual visitors, 40% of which consulted PORDATA more than once.

PORDATA continues to multiply its accesses by means of applications (iPhone and Android), which have been downloaded over 30.000 times, and via social networks (having more than ten thousand fans).

With a daily presence in the media, 2012 also involved a partnership with Metro newspaper: PORDATA was a regular presence every Tuesday and Friday, disseminating facts on various themes of Portuguese society.

Loyalty in PORDATA consultations
(% of visitors by number of visits)
- Year 2012



Source: Google Analytics

PORDATA Statistics: Summary table 2012

Number of pages visited	4.720.927
Number of visits	685.004
Number of individual visitors	468.227
Average time per visit	06:10
Average number of visited pages	6,89
New visits in %	58,8%
Social Networks	
Number of fans (facebook)	10.809
Number of followers (twitter)	3.012
Applications	
iPhone + Android	27.954

APPENDIX 6.

PORDATA'S

TRAINING

ACTIVITIES

IN 2012

Municipalities covered:83

Districts: Viana do Castelo, Braga, Vila Real, Porto, Aveiro, Bragança, Guarda, Viseu, Coimbra, Castelo Branco, Leiria, Santarém, Portalegre, Lisboa, Setúbal, Évora, Beja, Faro

Autonomous Regions: Azores

Entities Involved

Political Bodies: Presidency of the Portuguese Republic

Press: Jornal Oje, Jornal Região de Leiria

Television: RTP and RTP Azores

High-schools: School Libraries Network and Association of Private and Cooperative Education Institutions (123 schools), and the Basic School Garcia Brás de Mascarenhas

Higher Education: Catholic University, Lisbon's University Nova, University of Minho, University of Beira Interior, University of Aveiro, University of Coimbra, Lusófona University, University of Lisbon, University of Oporto, University of Azores, University of Trás-os-Montes e Alto Douro and Polytechnic Institute of Viseu

Town Councils: Setúbal, Faro, Maia, Alfândega da Fé, Matosinhos, Cascais,

Torres Novas, Arruda dos Vinhos, Mangualde, Guimarães e Sintra

Political organisations: Juventude Socialista da Moita (Socialist Party Youth Group of Moita)

Libraries: Municipal Libraries of Miranda do Corvo, Lousada, Santa Maria da Feira, Ferreira do Zêzere, Almeirim and São Domingos de Rana

Consultants: BSD Consulting, Deloitte

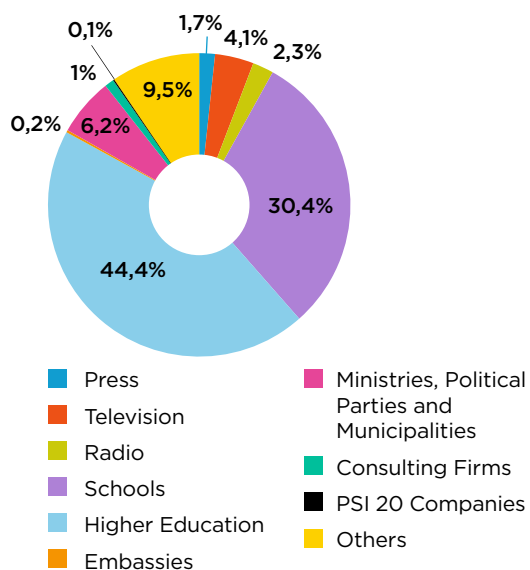
PSI 20 Companies: Jerónimo Martins

Other entities: Fertagus, European Anti-Poverty Network, Gulbenkian Foundation, António Aleixo Foundation

Trainee Evolution, from the beginning of the Programme:

	Trainees	Training Activities
2010	1.085	68
2011	3.352	164
2012	3.644	136
Total	8.081	368

Trainees by activity type, in % of the total:



APPENDIX 7. BIBLIOGRAPHIES AND CHRONOLOGIES

Themes for Bibliographies

1. History of Portugal, 20th century
2. Population and demography (including migrations)
3. Portuguese Politics (including international relations)
4. Economics (including companies and international trade)
5. Education
6. Social Issues
7. Health
8. Justice
9. Culture
10. Science
11. Territory, State and Public Administration

Subjects for Chronologies

1. Politics
2. Economics
3. Society
4. Culture
5. International context

APPENDIX 8. PUBLICATIONS IN 2012

Foundation's Essays

The New Medicine,
João Lobo Antunes
The Middle Class: Rise and Fall,
Elísio Estanque
Portugal: Public Debt and Democratic Deficit,
Paulo Trigo Pereira
Armed Forces in Portugal,
J. Loureiro dos Santos
Ageing of Portuguese Society,
Maria João Valente Rosa
Mathematics in Portugal, An Educational Issue,
Jorge Buescu
Teaching History,
Gabriel Mithá Ribeiro
Portugal, the Portuguese: National Identity,
José Manuel Sobral
Crisis, Family and Family Crisis,
Mónica Leal da Silva

Foundation's Studies

Social Issues:

Economic Inequalities in Portugal,
Carlos Farinha Rodrigues

Justice and Law:

Drug and higher education funding:
Legislative Impact Assessment,
Ricardo Gonçalves (Coordinator)

Economic Justice in Portugal,
*Mariana França Gouveia, Nuno Garoupa,
Pedro Magalhães and Jorge Morais Carvalho*

This Study includes 9 publications,
6 of which are Thematic Reports
Vol. I: The Judicial System
Vol. II: Facts and Numbers
Vol. III: Synthesis and Proposals

Thematic Reports:

1. The New Procedural Model
2. Procedural Management and Oral Proceedings
3. Adducing of Evidence
4. Servicing the Defendant in civil procedure
5. VAT Recovery
6. Alternative Dispute Resolution Methods

Key Conferences on Education

The New Schools, *Margaret E. Raymond,
Simon J. Steen, Alexandre Homem Cristo*
The New Technologies, *Jeroen van
Merriënboer, Secundino Correia, João
Paiva*
Student Assessment, *Jeffrey Karpicke,
Hélder Diniz de Sousa, Leandro S.
Almeida*

Other publications

The Future of Fiction, *António-Pedro
Vasconcelos*
Global Changes, *Filipe Duarte Santos*
An Information Culture for the Digital
Universe, *José Afonso Furtado*

APPENDIX 9. “FOUNDATION’S ESSAYS” COLLECTION

As from FFMS’s set up, in 2010, until December 2012, 30 volumes have been published in the collection “Foundation’s Essays”:

Teaching Portuguese,

Maria do Carmo Vieira

Portuguese Economics: The last Decades,

Luciano Amaral

Portugal: the numbers,

Maria João Valente Rosa and Paulo Chitas

Fiscal Justice,

J. L. Saldanha Sanches

What’s difficult is educating Them,

David Justino

Authority,

Miguel Morgado

Private Property: Between privilege and freedom,

Miguel Nogueira de Brito

Live Philosophy,

Desidério Murcho

Science in Portugal,

Carlos Fiolhais

Social Security: The future mortgaged,

Fernando Ribeiro Mendes

Economics, Morals and Politics,

Vitor Bento

Discrimination against the Aged,

Sibila Marques

Corruption,

Luís de Sousa

Portugal and the Sea,

Tiago Pitta e Cunha

Polls, Elections and Public Opinion,

Pedro Magalhães

Television and Public Service,

Eduardo Cintra Torres

Judicial Delays,

Conceição Gomes

Death,

Maria Filomena Mónica

Republican Essay,

Fernando Catroga

Justice Administration,

Nuno Garoupa

Freedom of Information,

José Manuel Fernandes

The New Medicine,

João Lobo Antunes

Middle Class: Rise and Fall,

Elísio Estanque

Portugal: Public Debt and Democratic Deficit,

Paulo Trigo Pereira

Armed Forces in Portugal,

J. Loureiro dos Santos

The Ageing of Portuguese Society,

Maria João Valente Rosa

Mathematics in Portugal, An Educational Issue,

Jorge Buescu

Teaching History,

Gabriel Mithá Ribeiro

Portugal, the Portuguese: National Identity,

José Manuel Sobral

Crisis, Family and Family Crisis,

Mónica Leal da Silva

“Foundation’s Essays” – Aggregate sales 2010-2012

Nr.	Title	Date of Publication	Total
1	Teaching Portuguese	2010	24.852
2	Portuguese Economics: The last Decades	2010	23.616
3	Portugal: the numbers	2010	22.195
4	Fiscal Justice	2010	30.224
5	What’s difficult is Educating Them	2010	12.880
6	Authority	2010	8.990
7	Private Property: Between privilege and freedom	2010	8.382
8	Live Philosophy	2011	13.923
9	Social Security: The future mortgaged	2011	9.350
10	Science in Portugal	2011	7.640
11	Economics, Morals and Politics	2011	18.177
12	Discrimination against the Aged	2011	6.458
13	Corruption	2011	10.700
14	Portugal and the Sea	2011	10.116
15	Polls, Elections and Public Opinion	2011	5.456
16	Television and Public Service	2011	3.746
17	Judicial Delays	2011	4.558
18	Death	2011	15.525
19	Republican Essay	2012	4.179
20	Justice Administration	2012	4.057
21	Freedom of Information	2012	4.949
22	The New Medicine	2012	6.927
23	Middle Class: Rise and Fall	2012	6.478
24	Portugal: Public Debt and Democratic Deficit	2012	8.572
25	Armed Forces in Portugal	2012	4.568
26	Ageing of Portuguese Society	2012	4.766
27	Mathematics in Portugal, An Educational Issue	2012	4.111
28	Teaching History	2012	2.084
29	Portugal, the Portuguese: National Identity	2012	3.027
30	Crisis, Family and Family Crisis	2012	2.512
Total			293.018

* This quantity should be added of 21.836 gift copies

APPENDIX 10. ANNUAL MAGAZINE “XXI, TER OPINIÃO”

Editorial Team

Editor

António Barreto

Manager

José Manuel Fernandes

Editorial Board

Alexandre Quintanilha

André Azevedo Alves

António José Teixeira

Francisco José Viegas

Gonçalo Vieira

Joana Mateus

Jorge Portugal

José Tavares

Maria João Valente Rosa

Paulo Guinote

Pedro Pita Barros

Pedro Santos Guerreiro

Producers

Filipa Dias

Susana Norton

Teresa Mourão-Ferreira

Art Direction

Jorge Silva

APPENDIX 11. CITIZEN'S PORTAL: RIGHTS AND RESPONSIBILITIES

Themes and management

General Coordinator: *Nuno Coelho*

Coordination Advisor: *Luís Coelho*

Proof-reader: *Nuno Quinta*

Teams for Themes:

Labour law: *Luís Azevedo Mendes* and *Paulo Morgado Carvalho*

Constitutional Law: *Paulo Lobato Faria* and *Rita Fonseca Marques*

Civil Law: *José Igreja Matos* and *Alessandra Silveira*

Criminal Law: *Pedro Caeiro* and *Miguel João de Almeida Costa*

Themes:

Constitution, politics and society

State and Public Administration

Individual life and family life

Working life

Economy, business and consumers

Health, social security and solidarity

Education, media, science and technology

Culture, environment and sports

Understanding and guaranteeing rights and duties

APPENDIX 12.

EDUCATION

BOARD

Composition

Coordinator

Carlos Fiolhais

Advisor

Mónica Vieira

Members

Ana Maria Morais, University of Lisbon

Carlos Grosso, João de Deus Higher School
for Education

Graça Ventura, High School Teacher

José Morais, Université Libre de Bruxelles

Maria Helena Damião, University of Coimbra

Paulo Guinote, First Grade Teacher

Pedro Carneiro, London University

APPENDIX 13. KEY ISSUES ON EDUCATION

Conference Themes, publications and authors

Conferences in 2010:

the importance of education, the value of instruction

*Fernando Savater, Ricardo Moreno Castillo,
Nuno Crato and Helena Damião*

does doing sums help us think?

*Michel Fayol, Andrei Toom, António Bivar,
Carlos Santos and Luís M. Aires*

how do you learn to read?

*Roger Beard, Linda Siegel, Isabel Leite and
Ana Bragança*

Conferences in 2011:

in debate: learning to learn

*Lynne M. Reder, John R. Anderson, Herbert
A. Simon, Paula Carneiro and Pedro B.
Albuquerque*

the value of experimental education

*David Klahr, Margarida Afonso, Dolores
Alveirinho, Vanda Alves, Sílvia calado, Sílvia
Ferreira, Preciosa Silva and Helena Tomás*

learning a second language

Carmen Muñoz, Luísa Araújo and Carlos Ceia

Conferences in 2012:

student assessment

*Jeffrey Karpicke, Hélder Diniz de Sousa and
Leandro S. Almeida*

the new schools

*Margaret E. Raymond, Simon J. Steen and
Alexandre Homem Cristo*

the new technologies

*Jeroen van Merriënboer, Secundino Correia
and João Paiva*

APPENDIX 14. SCIENCE AND INNOVATION COUNCIL

Members

coordinator:

Carlos Fiolhais

advisor:

Mónica Vieira

members:

Carlos Geraldes, University of Coimbra

*Catarina Resende de Oliveira, University of
Coimbra*

Elvira Fortunato, Lisbon's University Nova

Irene Fonseca, Carnegie Mellon University

José Ferreira Gomes, University of Oporto

Manuel Paiva, Université Libre de Bruxelles

Maria Mota, University of Lisbon

Maria de Sousa, University of Oporto

*Nuno Ferrand de Almeida, University of
Oporto*

*Onésimo Teotónio de Almeida, Brown
University*

Pedro Guedes Oliveira, University of Oporto

Rosa Figueiredo Pérez, University of Lisbon

APPENDIX 15. PROJECTS IN PROGRESS

Permanent projects

Databases

PORDATA: Contemporary Portugal Database Portugal, Europa, Portuguese Regions and Municipalities	Maria João Valente Rosa
Global Data, Globalisation Database	Miguel Maduro Maria João Valente Rosa Gabi Umbach
POP, Public Opinion Portal	Pedro Magalhães Alice Ramos and Cícero Pereira
Understanding the Crisis Portal	Alice Ramos Filipa Dias
Citizen's Portal: Rights and Responsibilities	Mariana França Gouveia Nuno Coelho
Bibliographies on Contemporary Portugal	Paulo Silveira e Sousa
Chronology of Contemporary Portugal: 1960/2010	Paulo Silveira e Sousa

Publications

The Foundation's Essays	António Araújo
Studies and Notebooks	António Araújo
Portraits	António Araújo
XXI - Having an Opinion	José Manuel Fernandes

Areas, Studies, Programmes and Projects

Health (*José Mendes Ribeiro*)

Costs and Prices of Health	Carlos Costa
Infant Mortality: evolution and causes of decrease	Xavier Barreto J. P. Correia

Documentary on Infant Mortality	Xavier Barreto J. P. Correia Joana Pontes
Health Information	Rita Espanha
Population and Demography (<i>Maria João Valente Rosa</i>)	
Fertility and birth rates	Maria João Valente Rosa and INE
Demographic dynamics and ageing	Manuel Villaverde Cabral Mário Leston Bandeira
Ageing Processes: Social Implications	Manuel Villaverde Cabral Pedro Moura Ferreira
The Social Issue (<i>José Tavares</i>)	
Economic Inequalities in Portugal	Carlos Farinha Rodrigues
Tax Policy and Income Tax	Carlos Farinha Rodrigues
Education (<i>Carlos Fiolhais</i>)	
Key issues on Education	Carlos Fiolhais
School Manuals for Portuguese Language	Isabel Leite
Conceptual requirements in teaching sciences	Maria Margarida Carvalho
Mathematics in Basic and High-school Education	António Bivar
Beliefs of reading teachers in Basic Education	João Lopes, Luisa Araújo, Louise Spear, Gabriela Velasquez and Leandro Almeida
Classroom journals	Maria Filomena Mónica
The new Schools: Great-Britain, Scandinavia and Holland	Alexandre Homem Cristo
Performance in Mathematics in transitioning to Higher Education	Miguel Abreu, Marília Pires, Maria João Afonso Portuguese Mathematics Society
Workload in compulsory education	Isabel Festas
Exams in the EU, in the USA and in Singapore	Invitation for a selected number of Institutions
Social Values, Attitudes and behaviours (<i>José Tavares, Pedro Magalhães and José Pena do Amaral</i>)	
Cultural values, economical development and the quality of democracy	Alejandro Portes Margarida Marques
Values and attitudes towards change; in the direction of a model for new economic development. The vision of mayors, businessmen and general population.	João Ferrão

Justice and Law (*Nuno Garoupa*)

Legislative Impact Assessment: drug law and higher education funding law	Ricardo Gonçalves
Legislative Assessment: the status of art in Europe	Marta Tavares de Almeida João Caupers Pierre Guibentif
Economic Justice in Portugal	Nuno Garoupa Mariana Gouveia Jorge Morais Carvalho
e-book: Revising the Constitution	Nuno Garoupa Pedro Magalhães José Tavares Miguel Maduro
Judicial backlog in Europe	Nuno Garoupa Sofia Pires de Lima
Judicial Confidentiality: comparative study in Portugal and Spain	Fernando Gascón
Public Prosecution Office and Attorney General: Relations with the executive, the legislative and the judicial powers. Models, problems and solutions. Selection and assessment. A comparative study.	Jose Martin Pastor
Judges: A comparative study on training methods and systems, selection, career advancement and assessment.	Carlos Gomez Liguierre

Development (*Miguel Maduro and José Tavares*)

Portuguese Participation in European decisions	Richard Rose Alexander Trechsel
The contribution of EU funding in Portuguese Development	Augusto Mateus
The economical effects of public investments in infrastructures	Alfredo Marvão Pereira
Land Register in Portugal	Rodrigo Sarmiento Beires

Science (*Carlos Fiolhais*)

Portuguese Scientists abroad: Database and Contact Platform	<i>Carlos Fiolhais</i>
Corporate Innovation	Mira Godinho

APPENDIX 16. MEETING THE PRESENT IN THE FUTURE

Speakers, moderators and rapporteurs

Alexandre Quintanilha, Alexandre Soares dos Santos, Álvaro Domingues, Ana Nunes de Almeida, Anália Torres, Andrew Zolli, António Barreto, António José Teixeira, António Mega Ferreira, [António Sousa Homem] Francisco José Viegas, António Vitorino, Augusto Mateus, Carl Haub, Carlos Farinha Rodrigues, Carlos Fiolhais, Carlos Melo Ribeiro, Carlos Vaz Marques, Cláudia Pina, Cristóvão Fonseca, David Justino, Eduarda Marques Costa, Fátima Barros, Fernanda Cândia, Fernanda Freitas, Fernando Casimiro, Fernando Henrique Cardoso, Fernando Ribeiro Mendes, Gilberta Pavão Nunes Rocha, Henrique Cayatte, Isabel Jonet, Isabel Vaz, João Barreto, João Ferrão, João Miguel Tavares, João Peixoto, Jorge Macaísta Malheiros, José Alberto Carvalho, José Galamba de Oliveira, José Pacheco Pereira, José Pedro Cobra, José Pena do Amaral, José Soares dos Santos, José Tavares, José Tolentino de Mendonça, José Vítor Malheiros, Kalaf Ângelo, Laurinda Alves, Luísa Schmidt, D. Manuel Clemente, Manuel Villaverde Cabral, Marco Costa, Maria Filomena Mendes, Maria Filomena Mónica, Maria Flor Pedroso, Maria João Valente Rosa, Maria Joaquina Madeira, Maria

José Carrilho, Maria Luís Rocha Pinto, Maria Margarida Marques, Mário Centeno, Natasha Marjanovic, Onésimo Almeida, Patrick Monteiro de Barros, Paulo Chitas, Paulo Machado, Pedro Pita Barros, Pedro Ribeiro, Pedro Telhado Pereira, Ricardo Araújo Pereira, Ricardo Dias Felner, Rui Horta, Rui Macena, Rui Ramos, Teresa Pizarro Beleza, Tiago Pitta e Cunha.

Partners of the Meeting

institutional partners: Accenture, Lisbon Town Council, Foundation for Science and Technology, Scientific Computing National Foundation;

Media: TVI, Rádio Comercial, M80, Cidade FM;

Sponsors: FNAC, Statistics National

Institute, National Geographic, Olá, Pingo Doce, Recheio, OJE newspaper;

Organisation: Multilem, O Escritório e Mola Ativism, Initiative Media, View Isobar, Lift Consulting and Filmbrokers.

APPENDIX 17. PROTOCOLS AND COOPERATION AGREEMENTS WITH OTHER INSTITUTIONS

ACL – Associação Comercial de Lisboa [Lisbon Commercial Association]

AMA – Augusto Mateus Associados

CEGEA – Centro de Estudos em Gestão e Economia Aplicada da Faculdade de Economia e Gestão da Universidade Católica Portuguesa no Porto [Center for Studies in Management and Applied Economics of the Management and Economy Faculty of the Oporto Catholic University]

DGAI – Direcção Geral da Administração Interna [Directorate-General for Internal Affairs]

Diário de Notícias

ENSP da UNL, Escola Nacional de Saúde Pública da Universidade Nova de Lisboa [National School of Public Health of Lisbon's University Nova]

Expresso

FE da UNL – Faculdade de Economia da Universidade Nova de Lisboa [Faculty of Economy of Lisbon's University Nova]

ICS da UL – Instituto de Ciências Sociais da Universidade de Lisboa [Social Sciences Institute of Lisbon's University Nova]

IE da UL – Instituto de Envelhecimento da Universidade de Lisboa [Ageing Institute of the Lisbon University]

IGP – Instituto Geográfico de Portugal [Portuguese Geographic Institute]

IM – Instituto de Meteorologia [Meteorology Institute]

INE – Instituto Nacional de Estatística [Statistics National Institute]

Instituto de Informática, IP [Public Institute for Information Technologies]

Instituto de Segurança Social, IP (Centro Nacional de Protecção contra os Riscos Profissionais) [Social Security Institute, Public Institute (National Center for the Protection of Professional Hazards)]

Instituto Universitário Europeu, IUE, Florença [European University Institute, Florence]

ISEG da UTL – Instituto Superior de Economia e Gestão da Universidade Técnica de Lisboa [Management and Economy Higher Institute of the Lisbon Technical University]

ISEGI da UNL – Instituto Superior de Estatística e Gestão de Informação da Universidade Nova de Lisboa [Information Management and Statistics Higher Institute of Lisbon's University Nova]

Porto Editora

Público

RBE – Rede de Bibliotecas Escolares [Network of School Libraries]

Rede UNICRE

Relógio d'Água Publishers

RTP – Radiotelevisão de Portugal [Portuguese Public TV broadcasting network]

SIC

TSF

UA – Universidade do Algarve [University of Algarve]

UC – Universidade de Coimbra [University of Coimbra]

UL – Universidade de Lisboa [University of Lisbon]

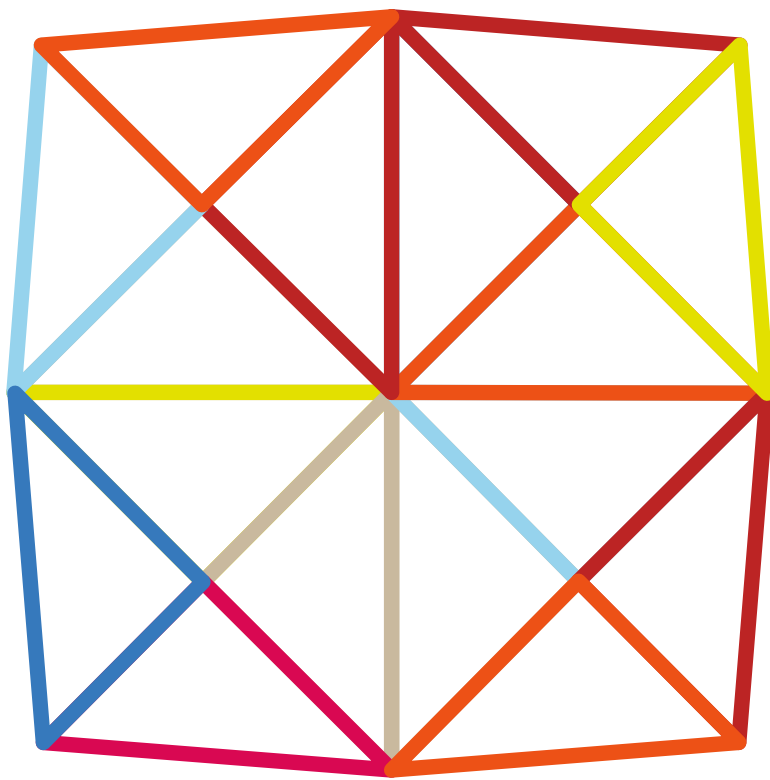
UP – Universidade do Porto [University of Oporto]

Visão

APPENDIX 18. DISTRIBUTION OF EXPENSES BY THEME AND OPERATION

	2010	2011	2012
	%	%	%
Annual Endowment	100.00	100.00	100.00*
Operating costs	16.00	21.00	24.40
Projects:			
PORDATA	5.00	20.00	17.41
Annual Essays	6.00	9.52	13.36
Education Programme	3.00	5.32	3.54
Justice Programme	0.50	4.46	1.45
Health	2.00	2.60	3.04
Programme population and demography	0.50	2.66	2.19
Values and attitude	0.50	1.30	2.97
Social issues	1.00	1.80	0.34
Development issues	1.50	2.10	7.36
Communication, promotion and debates	5.00	12.04	10.27
Meeting the Present in the Future			43.75

* The aggregate costs exceeded the annual endowment, utilising reserves from previous years.



KNOW WHAT TO ASK




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