



Integrating Companies in a Sustainable Apprenticeship System

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Intellectual Output 6A

The Portuguese Qualification Framework -PTQF (Sistema Nacional Qualificações, NQF) and initial qualifications from shoe sector

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1. Overview of the Portuguese Qualification Framework - PTQF

In 2007, the European Qualifications Framework (EQF) and the National Qualifications Framework (NQF) were established to enhance the basic training of the workforce, by raising its level of qualifications (school and professional). At the same time, in Portugal the National Qualifications Agency (ANQ) (current ANQEP, IP) was created, aiming at coordinating the NQF, jointly with other competent bodies in the area of vocational education and training (in particular the Ministry of Education, current MEC). The NQF covers all programs leading to obtain formal qualifications, regardless of being supervised either by the Ministry of Education and Science or by the Ministry of Labour (currently Economics).

The National Qualifications Framework (NQF) is a single reference tool to classify all the qualifications produced in the national educational and training system.

The NQF comprises 8 Qualification Levels, each one defined by a set of indicators that specify the learning outcomes corresponding to the qualifications at that level in terms of Knowledge, Skills/competences and Attitudes.

The NQF adopts the qualification levels and respective descriptors of the European Qualifications Framework (EQF).

The National Catalogue of Qualifications includes school-based VET programs (although with a work-based learning component), which are dependent on the Ministry of Education and Science, and work-based VET programs which are financed by the IEFP – Employment and Vocational Training Institute, dependent on the Ministry of Labour. The first type of programs belongs to the Vocational Education System and the second one to the so-called Learning System.

The National Catalogue of Qualifications:

- is a dynamic instrument for the strategic **management of non-higher** national qualifications (from level 2 to 5)
- is managed by ANQEP
- is the **regulation of the double certification training offer**
- integrates **qualification references** for double certification training and for processes of recognition, validation and certification of competences (RVCC)
- is the **promotion of the effectiveness of public financing**
- includes a large number of qualifications for **39 education and training** areas and presents the associated Professional Profile and Training References for each qualification. (310 qualifications: 110 L2 (operator); 156 L4 (Technician); 44 L5 (Specialized Technician), 22 adapted qualification (for people with special needs), 30 qualifications for TCLF, modularised qualifications.

A. VET programmes in the educational system (Vocational Education System)

The following programs fall into this category:

- Vocational training of double certification (Education and Training Courses – CEF) for young people who have completed the 2nd cycle of basic education (5th and 6th grades) or who are attending the second (last) year of that cycle. These courses provide a level 2 qualification according to the NQF.
- Vocational training of double certification (Education and Training Courses – CEF) and Vocational Courses for young people (13 year old) as part of the 3rd cycle of basic education: these courses have a modular structure and a duration of between one and two years. They provide level 2 qualification according to the NQF and give access to general secondary education and to vocational programs of secondary level.
- Vocational training of double certification (Education and Training Courses – CEF) and Vocational Courses for young people (from 15 years) as part of higher secondary education: these courses are devoted to students who have completed the 3rd cycle of basic education. They are three years long and provide level 4 qualification according to the NQF and a diploma of secondary education.
- Professional Training Courses: these programs are intended for students who have completed the 3rd cycle of basic education and did not concluded their secondary education. The maximum workload is 3,100 hours and the technical training workload is 1,600 hours. 420 hours out of those 1,600 hours should be at least devoted to work-based learning. These courses last three years and provide level 4 qualification according to the NQF and a diploma of secondary education.
- Completion of Education and Training Courses, Vocational Courses and Professional Training Courses of secondary level give access to post-secondary non-tertiary vocational education (Technological Specialization Courses – CET) and to higher education, but in these cases students should meet the conditions set out in the Access Regulation.
- Post-secondary non-tertiary vocational education for young people with 18-19 years and for young adults until 23 years: these courses have a duration of one year and provide level 5 qualification, according to the NQF.¹ The candidates to these courses are youngsters with diplomas of secondary education or equivalent, students with 10th and 11th grades and frequency of the 12th year, holders of level 3 qualifications and holders of technological specialization diplomas or degrees of higher education. Technological Specialization Courses are mainly provided by Polytechnic Institutions (higher education) and other certified institutions.

¹ In the vast majority of European countries these courses are level 4 qualification programmes, according to the ISCED framework.

B. VET programmes in the employment system (Learning System)

These programs belong to the so-called learning system, which was launched in 1984 as an alternative to the traditional training system. Initially, it was intended to support the qualification and certification of young people who, for various reasons, prematurely abandoned the education system. It is a double certification system, where there is strong interaction between theoretical and practical training components. Practical training is mainly in company/in sectoral training centres work-based learning.

The learning system depends exclusively upon the Employment and Vocational Training Institute (IEFP). In this work-based learning system companies are recognized as privileged spaces for training, since they allow students' learning in a real work environment. In these courses, learning processes are divided into four components: socio-cultural, scientific, technological and practical. The workload of these programmes varies between 2,800 and 3,700 hours, depending on the specificities and the degree of complexity of the learning process. The workload of in-company training cannot be lower than 40% of total workload, varying though between 1,100 and 1,400 hours.



2. Spheres of Activity in industrial shoe production

Brief Outlines of the Spheres of Activities of Industrial Shoemakers

Depending on design and make, a shoe consists of several dozen components and its manufacture requires up to 150 work steps. In that sense, shoe production is a relatively complex process, which is mainly characterized by various joining methods. Experienced skilled workers are needed in all departments of a shoe factory, especially at key operations such as cutting, stitching and lasting.

2.1. Cutting and Clicking of Materials for Upper Manufacturing (“Cutting”)

The task of the cutting department staff is to cut the shoe parts from upper, lining, interlining and reinforcement materials (leather, synthetic leather, natural or synthetic textiles) in the required geometries.

The following cutting techniques are used:

- Hand cutting with knife and pattern stencils: Mainly used for sample and small series production.
- Clicking machines and cutting dies (swing arm cutting presses for cutting upper and lining leather, travelling head and beam cutting presses for natural and synthetic textile materials): typically used for serial production.
- Dieless cutting on automated CAM cutting tables (oscillating blade / punching / roughing tool, water jet or laser): mainly used for prototyping and small series production, but also for serial production. The cutting geometries are provided by the CAD system.

Material, colour, number of pairs and special requirements can be found in the accompanying specifications that come with each work batch.

Prior to cutting, the leather hides and skins must be checked in terms of differences in thickness and colour, quality zones and eventual defects. Crucial in leather cutting – whether manual, machine cutting or computer-aided – is the compliance with the cutting rules (quality rule, pairing rule, stretch direction) because they influence the quality of the final product. Skill and experience in creating a cutting layout on a hide or skin are also imperative to minimise waste, because the upper leather represents by far the largest single cost item in shoe production.

Further operations in the cutting room are splitting of the cut parts (to reduce them to the required even thickness) and stamping of the parts (article number etc.). The quality control of the cuts is carried out directly in the department.

2.2. Preparation of Upper Parts and Upper Stitching (“Pre-Stitching and Stitching”)

Upper manufacturing is time- and labour-intensive and can only be automated to a limited extent, at least in leather street shoe production. Upper manufacturing (the term used for sewing operations in the footwear industry is “stitching”) represents the biggest item in terms of value creation in footwear production. Experienced stitching operators are particularly sought-after.

In upper manufacturing, a distinction is made between preparatory work (“pre-stitching”) and the actual upper assembly (“stitching”).

The stitching work to be done on a shoe depends on the model. Essentially, upper manufacturing consists of assembling all lining parts, assembling all outer upper parts, and then stitching together lining and outer upper with some subsequent final operations.

The necessary pre-stitching operations depend on the type of shoe, the specific model and the material. Typical pre-stitching operations are:

- Skiving (beveling respectively thickness reduction of the edges of shoe parts)
- Splitting (to achieve homogenous thickness)
- Marking (e.g. to provide guidance for stitching or punching)
- Edge inking (open edges of non through-dyed leathers)
- Cementing (applying adhesive to parts and joining them together)
- Folding (to fold down previously skived edges with adhesive)
- Perforating, punching, embossing
- Reinforcing (with adhesive or ironing-on)
- Crimping (pre-moulding for better shape, e.g. for boot legs)

Pre-stitching operations are done partly manual, partly on machines. They can be decisive for the quality of the final product.

Upper assembly is done on stitching machines. There are various types: Flat-bed, post-bed or cylinder-arm machines, as well as single-needle, two- and three-needle machines to perform the numerous stitch types for closing and decorative seams.



2.3. Preparation of Uppers and Bottom Parts for Lasting and Lasting (“Lasting”)

“Lasting” means attaching the lasting margin (i.e. the lower edge of an upper) by means of tacks and/or adhesives to the insole, which can be considered as the constructive backbone of footwear, although it is not at all visible on the final product. Lasting is one of the crucial operations in footwear production. Depending on the construction method, the lasting proceedings can differ.

Prior to lasting, toe puffs and heel counters must be inserted into the finished uppers in between upper and lining material in order to reinforce toe and heel. Toe puffs are usually ironed in. Leather fibre-board heel counters are dipped into latex adhesive, dried and then inserted by hand; another type of heel counters are thermoplastic heel counters. Some shoe types require crimping of the vamp, and most shoe types require back part moulding (hot and cold, depending on the type of heel counter). In parallel, lasts and insoles are prepared. The insoles are stapled to the last.

Thicker upper leathers should be treated with tempered water vapour or softener in order to prevent the grain from cracking (during the toe lasting process, the material must endure an elongation of up to 30%). Next to the toe lasting machine, a toe activating device is positioned, which heat-activates the toe puff (some devices work with tempered water vapour to soften the leather and toe puff, and with a mould shaped like the front part of the last to increase mouldability and to pre-mould the toe area).

Lasting starts with pulling the upper in the correct position over the last. Most companies use the two-machine-lasting system, i.e. toe lasting is performed on the first machine and then side-and heel lasting on the second machine. The machine pincers pull the upper material close to the last and the lasting edge is attached under the insole.

During the lasting process, the upper is exposed to high tensile forces in order to shape it to the last.

Some factories use a pounding machine or just manual hammering to improve the lasting result (i.e. flatten the lasting edge and get rid of eventual creases).

The subsequent steps are throughput of the lasted uppers through heat- and cool-setting tunnel transport systems which improve the shape retention of the materials as well as the fit of the final product.

2.4. Assembly of Uppers and Bottom Parts (“Assembly”)

In the assembly room, upper and bottom parts are joined. By the time the batch of lasted uppers enters the assembly room, the bottom parts in the correct sizes and numbers have been prepared and put on the rack shelves together with the uppers.

First, the staples fixing the insole to the last bottom need to be removed. The next step is roughing the lasting edge as a surface preparation for the adhesive bond. The objective of roughing is to smoothen potential creases, to remove the grain layer of the leather because it contains oils or other greases or surface treatments which will weaken the bonding strength, and to increase the bonding surface. Roughing can be performed on machines (roughing machines or combined roughing/cementing machines); however, manual roughing remains widespread. It is imperative to precisely respect the roughing contours and to remove just the grain layer in order to preserve the structural strength of the material. Roughing dust must be thoroughly blown off.

Then a filler is inserted into the cavity on the last bottom in order to compensate for the height difference between last bottom and lasting edge.

The next step is cementing, i.e. to apply adhesive onto the roughened shoe bottom (with a cementing or a combined roughing/cementing machine) as well as onto the sole. Although robotised adhesive application solutions for sole cementing exist, manual application with a brush is still common. Depending on the type of soling material, the appropriate adhesive needs to be chosen. Each adhesive type requires a specific surface treatment; the objective of pre-treatments is to clean the bonding surface and to create ideal conditions for the adhesive to adhere to the material.

After the mandatory drying times, the soles can be pressed. Therefore, the adhesive (sole and upper) is re-activated, the soles are positioned manually onto the last bottoms and the whole is then inserted into a sole press (hydraulic or pneumatic depending on their application suitability).

Alternatively, soles can be sewn-on, vulcanised or direct-injected depending on the construction method.

The subsequent operations are delasting and attaching the heel – if the shoe model provides for a heel. The soles of stitch-down or welt-sewn footwear require finishing operations such as scouring and/or polishing of the edges.



2.5. Finishing

In the finishing room, the shoes are prepared for sale and boxed.

Finishing operations include various work steps.

Depending on the type of upper material (leather finish and colours) the shoes must be cleaned and – if necessary – repaired. For this purpose, a wide range of tools and auxiliaries are available, which must be selected very carefully, especially for sensitive upper materials such as aniline leather or suede. Wrinkles are ironed out or smoothed-out with a blow-drier.

Spray-finishes, waxes and creams are applied, insocks or seat sock pieces are inserted, and decorative elements fixed.

A task of particular importance is the final quality control prior to shipment (please see also sphere 6; “Quality Assurance”).

Finally, the shoes are boxed in individual boxes and 10 or 12 or more pair boxes put in shipping cartons (preparation for shipping is often done in the dispatch warehouse).

2.6. Quality Assurance

Quality assurance of footwear relates mainly to three aspects: Visual appearance, fit and functional characteristics (e.g. durability, performance, absence of harmful substances).

Sensibly, these controls should not only be performed on the finished footwear, but at all manufacturing stages. All operators should systematically self-check their work, and all work batches should undergo a quality check before leaving each production department to avoid problems in subsequent processes. A visual quality control before boxing the shoes is standard.

When a customer performs pre-shipment inspections of shoes that were produced by a supplier, the visual control is carried out according to a sampling plan which defines how many shoes must be inspected and in order to be able to decide whether a production batch can be accepted or not.

Fit and wear testing is done by a panel of reliable and product sensible testers who will fill in a test questionnaire. This is commonly organised by the product development team. Bigger companies have dedicated fit and wear testing departments.

The control of technical aspects consists in subjecting the shoes to a series of physical and mechanical tests to ensure their quality and safety. The absence of harmful substances is checked through chemical testing. There are legal standards for the performance of footwear testing, defining the requirements in terms of sampling, conditioning of the samples and test execution in order to facilitate comparison of the results. If the test results are intended to be communicated to customers or other stakeholders, it is recommended to commission an independent laboratory to perform the testing. For certain types of shoes, such as safety shoes, this is even mandatory.

Definition of INSPECTION (according to ISO 2859-1): “Activity such as measuring, examining, testing or gauging one or more characteristics of a product or service, and comparing the results with specified requirements in order to establish whether conformity is achieved for each characteristic.”

2.7. Footwear Design

Shoe designers do not only design individual models, but also concepts for entire collections. The main focus is always to meet the tastes and needs of future buyers, both in terms of fashion as well as of quality and fit.

Designers must be creative, able to draw, have a sense of emerging trends and an eye for harmonious lines and colors. The success of the entire company depends on the success of the models with the customers and thus the success and the employment situation for the entire company.

A shoe designer should be familiar with the shoe making process in order to design models in such a way that the effort in production remains proportionate to the achievable selling price and that the manufacturing can be done with the existing equipment and skills.

Many designers still draw on paper or on deep-drawn copies of the last surface. Younger designers are increasingly moving from initial manual design sketches to design on 3D CAD systems. 3D CAD systems save time and money by permitting to evaluate designs already at an early stage on the screen (which can be shared with co-workers no matter where on the globe) instead of going through the traditional time-consuming prototyping process. In addition, 3D CAD systems generate geometry data for computer-aided machines (CAM and CIM machines).

2.8. Technical Development

When the designer has completed his work, the results are sketches on paper or on deep-drawn last copies, at least in most small and medium-sized enterprises of footwear industry. Only few designers of SMEs in the field of leather street shoes work with digital tools. In the universe of sports shoes, things are often different, especially since global agreements and speed play an even greater role here and CAD systems are very helpful for gaining valuable time.

No matter whether the designer produces sketches on paper or on deep-drawn last copies, the result is an upper design in the first place. Typically, the designer specifies the upper materials to use. In addition, the designer also creates the shoe bottoms, i.e. outsoles and heels, to match the respective lasts (usually also on paper). Bottom parts can also be selected from respective suppliers.



Designers therefore often purely focus on the creative part. Once a design idea exists, this is when the technical developers come into play. They take care of the digitization and the technical development of the designs.

Their work focusses on the following questions: How can the idea sketch of a shoe be broken down into producible individual parts with the correct dimensions and the necessary additions and reductions for production? How do you get from a 3D design on a deep-drawn last copy to stencils or punching knives for upper parts, which are to be cut from 2D materials and then reassembled into 3D objects? Which types of seams, of lining and reinforcement materials and, more generally, which operations in production are necessary to convert the idea into a product that the company can actually manufacture with the existing machinery and the know-how of the production staff?

2.9. Production Planning

Footwear production planning is about distributing and coordinating all activities related to footwear manufacturing.

Production planning activities include the following functions:

- Product data management: Classification of products in terms of size, style, variants, design, target market, materials, components, technical specifications etc.
- Order management: Inventory, manufacturing and delivery planning according to deadlines and available resources
- Manufacturing planning and monitoring: Planning and coordinating all the manufacturing phases and tracking work in progress and consumption
- Materials and components planning and inventory management: Ordering materials and components according to work orders and managing bills and keeping inventory
- Delivery and finished products stock management: Plan, organise and monitor logistics and supply chain activities
- Workforce management: Organising workforce accordingly to availability and keeping daily records of work hours and productivity
- Financial Management: Accountancy system that provides accurate and on time information regarding cash flows, fund flows, recurring expenses, costing and efficiency of manufacturing systems, budgeting and fund allocations

Depending on the company (size, organisation of departments, distribution of activities etc.) part of the activities related to production planning can be included in other departments.

For increased efficiency, companies use software systems for production planning. The main software categories are ERP (Enterprise Resource Planning), PDM (Product Data Management) and PLM (Product Lifecycle Management) systems.

3. Portuguese qualifications from the shoe sector

Portuguese qualifications on level 2, 4 and 5 (European Qualification Framework (EQF)/ Portuguese Qualification Framework (PTQF)) with relevance for industrial shoe production are presented in Table 1:

Name of qualification (PT)	Name of qualification (EN)	PTQF level	EQF level	Length	Amount of learners
Operador de Fabrico de Calçado	Footwear Manufacturing Operator	2	2	3 years	Not available
Técnico/a de Fabrico Manual de Calçado	Footwear Manual Production Technician	4	4		
Técnico/a de Modelação de Calçado	Footwear Pattern Maker				
Técnico/a de Gestão de Produção de Calçado e Marroquinaria	Footwear & Leather Goods Production Manager	5	5	1 year	
Técnico/a Especialista de Design de Calçado	Footwear Designer				

Table 1: Portuguese qualifications from shoe sector on level 2, 4 and 5

Main features of **Footwear Manufacturing Operator**:

- Recognized and certified by ANQEP (National Agency for the Qualification and Professional Education Training) after approval of the sectorial counselling group for fashion industries, involving all technical experts and social partners;
- Published in the Employment and Labour Gazette nº 29 on 8th August 2013;
- This professional performs cutting, stitching preparation, stitching, assembly and finishing of footwear using different materials, equipment and techniques according to the established procedures on quality, maintenance and safety and health at work. This professional cut the different pieces of the footwear model, do all pre-stitching operations, namely skiving, splitting, crimping, punching, folding, apply reinforces, metallic accessories, perform all stitching operations with column and flat stitching machines, perform all the assembling operations, included in cemented footwear construction and eventually other type of constructions, perform all finishing operations, and control the quality of the work done.

Main features of **Footwear Manual Production Technician**:

- Recognized and certified by ANQEP (National Agency for the Qualification and Professional Education Training) after approval of the sectorial counselling group for fashion industries, involving all technical experts and social partners;
- Published in the Employment and Labour Gazette nº 30 on 15th August 2009;
- 1st Update published in Employment and Labour Gazette nº 48 on 29th December 2012, entered into force on 29th March 2013;
- This profile was developed having in mind the craftsmanship character of Footwear sector in Portugal;



- This profile has associated a training path for the apprenticeship training model which represents the closest possible training model to the dual training (combines training in a center and in the company for young people 15+);
- Manually run all modeling, cutting, closing, assembling and finishing footwear, as well as mechanical sewing operations thereof in accordance with the quality standards, environment, health and safety. In addition, is able to run his/her own business, handling the product promotion in various channels namely on-line and leading with management aspects of a micro company.

Main features of **Footwear Pattern Maker**:

- Recognized And certified by ANQEP (National Agency for the Qualification and Professional Education Training) after approval of the sectorial counselling group for fashion industries, involving all technical experts and social partners;
- Published in the Employment and Labour Gazette n° 29 on 8th August 2013, entering in force in the same day;
- Update published in Employment and Labour Gazette n° 17 on 8th May 2014, entered into force on 8th May 2014;
- To plan and develop molds of different footwear models, defining technical specifications regarding the manufacturing process, in order to assure the quality, productivity and security. The footwear pattern maker operates at an industrialization level, working as an interface between design and production, transforming designer's specifications into technical requirements, footwear concepts into manufacturing lines, making the patterns for uppers, linings and bottom components, producing technical drawings for various range of tools (cutting dies, mould, etc.), accompanying prototyping and evaluating footwear prototypes, grading and producing sizing samples, performing required tests for samples and confirming the customer's qualitative and pricing constrains.

Main features of **Footwear & Leather Goods Production Manager**:

- Recognized And certified by ANQEP (National Agency for the Qualification and Professional Education Training) after approval of the sectorial counselling group for fashion industries, involving all technical experts and social partners;
- Published for the first time in the Dispatch n° 13456/2008 14th May that approved the original version of the National Catalogue of Qualifications. The 1st update was published in the Employment and Labour Gazette n° 47 on 22th December 2009 and entered in force on 22nd March 2010. After that it had several updates . The last versions entered in force in 22nd October 2017;
- To plan, distribute, coordinate, monitor and control the activities of the different stages of footwear manufacturing, accordingly to the production objectives, deadlines and the available resources, taking into account the use of new generation equipment and materials, with a view to quality and productivity and the accomplishment of environment, energy rationalization, health and safety established standards

Main features of **Footwear Designer**:

- Recognized And certified by ANQEP (National Agency for the Qualification and Professional Education Training) after approval of the sectorial counselling group for fashion industries, involving all technical experts and social partners;
- Published in the Employment and Labour Gazette nº 12 on 29th March 2009;
- 1st Update published in Employment and Labour Gazette nº 28 on 29th July 2013, entered into force on 29th October 2013;
- To design and develop footwear products having into account the fashion trends, the quality standards, the commercial/marketing strategy of the companies involved and the technical constraints of the production.

Concerning these descriptions, the Portuguese QF levels 2, 4 and 5 for the footwear sector were divided into three main categories:



autonomous performance



initiation



partly; e. g. planning of a single product (not production line)



4. Portuguese contribution to SQR

Country Level according to EQF Spheres of activity in footwear sector (Qualification)

Country	Level according to EQF (Qualification)	Spheres of activity in footwear sector								
PT	Level 2 (Footwear manufacturing operator)	Cutting	Stitching	Lasting	Assembly	Finishing	Design	Technical development	Production planning	Quality assurance
PT	Level 4 (Footwear pattern maker)	Cutting	Stitching	Lasting	Assembly	Finishing	Design	Technical development	Production planning	Quality assurance
PT	Level 4 (Footwear Manual Production Technician)	Cutting	Stitching	Lasting	Assembly	Finishing	Design	Technical development	Production planning	Quality assurance
PT	Level 4 (Footwear & Leather Goods Production Manager)	Cutting	Stitching	Lasting	Assembly	Finishing	Design	Technical development	Production planning	Quality assurance

Table 2: Coverage of peripheral spheres by Portuguese Qualifications

5. References

Portuguese National Catalogue of Qualifications www.catalogo.anqep.gov.pt/

National Agency for the Qualifications and Professional Education ANQEP, IP.

<http://www.anqep.gov.pt/default.aspx>

Instituto Emprego e Formação Profissional www.iefp.pt



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