



O2 T3 Labour Market Intelligence Report – North Portugal Region

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Introduction

This report is based on a comparison of the Labour Market in North Portugal with the Portuguese Labour Market as a whole. It is derived from an analysis of Online Job Advertisements undertaken by Cedefop and the European Statistical Agency and made available through the Cedefop OVATE portal.

The report is structure in four sections:

- Occupational demand by sector

- Employment demand by occupation

- Skills demand

- Greenness and Green pervasiveness

The data for the first three is based on Q1 to Q4, 2023. The data on Greenness is from Q1, 2024.

The North Portugal Region Labour Market Intelligence Report provides an in-depth comparison between the labour market in North Portugal and the broader Portuguese labour market, focusing on occupational demand, skills demand, and green pervasiveness. Key findings reveal that North Portugal has a higher reliance on manufacturing and industrial sectors than the national average, with significant demand in manufacturing, administrative support, and ICT. The region's economy is characterised by strong industrial activity, with manufacturing roles representing around 15% of job advertisements, compared to 11% nationally. This indicates a concentration of industrial work, particularly in advanced manufacturing and supply chain management.

In addition to manufacturing, administrative and support services play a vital role in North Portugal's economy, making up nearly 20% of job ads, reflecting the importance of service-based roles. ICT demand is also significant, though slightly lower than in manufacturing, highlighting the region's growing digital transformation. To align with these demands, educational institutions need to prioritise technical, vocational, and digital skills training, particularly in areas like industrial automation, business administration, and programming.

The report also underscores the importance of healthcare and social work in both North Portugal and the broader Portuguese economy. With healthcare demand expected to rise due to an ageing population, there is a growing need for skilled healthcare professionals, particularly in nursing, elder care, and social work.

Educational programs in these areas should be expanded to ensure a steady supply of qualified workers to meet future healthcare challenges.

Furthermore, the report highlights the need for enhanced training in construction-related fields. North Portugal shows higher demand for construction workers due to ongoing development and urbanisation. Targeted training programs in sustainable construction practices and project management will be essential to ensure that the workforce can meet the demands of this growing sector.

North Portugal's labour market is more industrially focused than the national average, requiring a strong emphasis on vocational and technical education. Expanding training in manufacturing, healthcare, ICT, and green technologies will be critical to sustaining the region's economic growth and ensuring that the workforce remains competitive in the evolving labour market.

1. Comparative Report on Occupation Demand by Sector in Portugal vs. North Portugal Region

This report compares occupational demand by sector in Portugal as a whole and the North Portugal region, as represented by data from Online Job Advertisements (OJAs). The analysis will also explore the implications for economic and social development as well as education and training in these areas.

1.1 Key Differences in Sectoral Occupation Demand

1. Administrative and Support Service Activities:

- **Portugal:** This sector leads nationally with approximately 13% of the job advertisements.
- **North Portugal:** This sector has an even higher share, approaching 20% of job advertisements in the region.
- **Implication:** The high demand in administrative and support services in North Portugal reflects the strong service-based economy in the region. It indicates the need for robust training programs in office administration, customer service, and general business support skills. The education system should prioritise administrative skills and general management training, particularly for support service roles.

2. Manufacturing:

- **Portugal:** Manufacturing is among the top sectors nationally, representing around 11% of job advertisements.
- **North Portugal:** In North Portugal, the demand for manufacturing roles is significantly higher, also approaching 15%.
- **Implication:** North Portugal's economy is more reliant on manufacturing than the national average, indicating a higher concentration of industrial activity. Educational institutions in the region should continue to emphasise technical and vocational training in advanced manufacturing, industrial automation, and supply chain management to support this sector. A focus on green manufacturing and sustainability could also enhance competitiveness.

3. Information and Communication:

- **Portugal:** Nationally, this sector has a strong presence with approximately 9% of job advertisements.
- **North Portugal:** In the North, the share is similarly significant, showing that ICT skills are in demand, though it ranks slightly lower than manufacturing.

- **Implication:** ICT continues to play a pivotal role in the digital transformation of industries. Both Portugal and North Portugal need to prioritise digital skills training, including programming, cybersecurity, and data science. The digital sector in North Portugal has the potential for growth, and integrating more ICT-related educational programs will strengthen the region's ability to attract tech companies and digital service providers.

4. **Consultancy, Marketing, Accounting, and Legal Services:**

- **Portugal:** This sector is prominent across the country, representing roughly 9% of job advertisements.
- **North Portugal:** Similar demand levels are observed in North Portugal, indicating a balanced need for these services in the region.
- **Implication:** Consultancy and legal services are essential for businesses, especially as they scale or enter new markets. Universities and business schools should focus on expanding training programs in marketing, legal studies, accounting, and business consultancy. Professional development in compliance, digital marketing, and advisory services will ensure North Portugal's workforce remains competitive in these areas.

5. **Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles:**

- **Portugal:** Retail trade makes up around 7% of job advertisements nationally.
- **North Portugal:** The demand for retail and trade is comparable to the national level, though slightly lower than manufacturing and services in the region.
- **Implication:** Retail and trade continue to be vital components of the economy, providing a range of employment opportunities from sales to logistics. Educational programs in retail management, supply chain logistics, and customer service will be crucial to supporting this sector's growth, particularly in North Portugal, where manufacturing and trade intersect.

6. **Accommodation and Food Service Activities:**

- **Portugal:** This sector is substantial nationally, especially due to the country's reliance on tourism, contributing around 6% of the job advertisements.
- **North Portugal:** The sector is similarly represented in North Portugal.
- **Implication:** Tourism and hospitality remain critical to the economy of both Portugal and North Portugal. Educational programs should continue to focus on hospitality management, tourism services, and customer relations to meet the sector's growing demands. Multilingual skills, particularly in English, French, and Spanish, should be prioritised to cater to the international tourist market.

7. Human Health and Social Work Activities:

- **Portugal:** Health and social work represent about 8% of national job advertisements.
- **North Portugal:** The sector is similarly represented in North Portugal.
- **Implication:** The demand for healthcare professionals is consistent across the country, reflecting an ageing population and a growing need for health services. Vocational schools and universities should enhance healthcare training programs, particularly in nursing, elder care, and social work. Expanding health science programs will ensure a steady supply of qualified workers to meet future healthcare challenges.

8. Construction:

- **Portugal:** The construction sector represents a smaller share of job advertisements nationally, about 3-4%.
- **North Portugal:** Construction plays a slightly more significant role in North Portugal, particularly due to ongoing industrial and infrastructural projects.
- **Implication:** The region's higher demand for construction workers reflects ongoing development projects and urbanisation. There is a need for more targeted training in construction technologies, sustainable building practices, and project management to ensure the workforce can meet the demands of this growing sector.

9. Education:

- **Portugal:** Education-related job advertisements contribute to around 4% of total demand nationally.
- **North Portugal:** Education has a smaller presence in North Portugal, showing slightly less than 2% of demand.
- **Implication:** The relatively lower demand for education-related roles in North Portugal might suggest fewer immediate opportunities for educators in the region. However, this does not diminish the importance of strengthening educational institutions to meet the demands of other sectors, especially in manufacturing, healthcare, and services. Vocational training and specialised education programs should be tailored to fit the dominant industries in North Portugal.

1.2 Implications for Economic and Social Development

1. Focus on Manufacturing and Industrial Growth:

- Manufacturing is a more dominant sector in North Portugal than in the rest of the country. The region should continue to focus on industrial growth, with an emphasis on innovation, automation, and green manufacturing practices.
- **Implication:** Investment in infrastructure and modern manufacturing technologies will be key to maintaining North Portugal's competitive edge. Collaboration between industry and educational institutions will ensure that the workforce is equipped with the necessary skills.

2. Service Sector Strength:

- Administrative and support services dominate both the national and regional labour markets, signalling the continued importance of service-oriented jobs.
- **Implication:** Expanding business services training, particularly in office management, customer support, and administrative skills, will be critical to supporting both regional and national economies. Additionally, upskilling programs should focus on digital tools and project management.

3. Opportunities in ICT and Consultancy:

- ICT and consultancy services are growing both nationally and regionally, indicating an expanding knowledge-based economy.
- **Implication:** Promoting STEM education, ICT training, and professional consultancy programs will help meet this demand. North Portugal can benefit from positioning itself as a regional hub for consultancy and digital services by fostering partnerships between tech companies and universities.

4. Health and Social Services:

- The consistent demand for healthcare professionals indicates the growing importance of health and social care services, particularly in the context of an ageing population.
- **Implication:** Both Portugal and North Portugal must invest in healthcare training programs, with a focus on nursing, geriatric care, and public health. These programs should be designed to meet the rising demand for health and social services.

1.3 Implications for Education and Training

1. Expansion of Vocational and Technical Education:

- North Portugal's higher demand for manufacturing and construction workers indicates a need for expanded vocational and technical education.
- **Recommendation:** Schools should partner with local industries to offer specialised programs in industrial engineering, construction technologies, and

project management. Apprenticeships and hands-on training opportunities will ensure that students can transition smoothly into the workforce.

2. Strengthening Business and Administrative Training:

- The service sector's dominance in both regions highlights the need for strong business and administrative training programs.
- **Recommendation:** Business schools and vocational institutions should enhance programs in business administration, office management, and customer service. Digital literacy, office software training, and project management should be emphasised.

3. ICT and Digital Skills:

- The growing demand for ICT and digital skills in both regions indicates the need for enhanced technical education.
- **Recommendation:** Investment in ICT training programs, coding academies, and partnerships with tech companies will prepare students for roles in the digital economy. Special attention should be given to data science, cybersecurity, and software development.

4. Healthcare and Social Services:

- The consistent demand for healthcare professionals points to the need for robust health science programs.
- **Recommendation:** Vocational and university programs should expand offerings in nursing, social work, and elder care to meet the rising demand in both regions. Partnerships with healthcare providers can ensure practical, hands-on training for students.

1.4 Conclusion

The labour market in North Portugal demonstrates a higher reliance on manufacturing and industrial sectors compared to the national average, while both regions show strong demand for administrative, ICT, and service-based occupations. Educational and training programs in North Portugal should focus on enhancing technical skills, fostering industrial innovation, and providing targeted vocational education to meet regional labour demands. Nationally, business services, healthcare, and ICT remain critical sectors requiring ongoing investment in education and professional development.

Based on the charts for overall Portugal and the North Portugal region, a detailed analysis of occupational demand reveals some key differences and similarities. Below is a breakdown of these findings, along with the implications for economic and social development as well as education and training.



2. Comparative Analysis of Employment Demand

2.1 Key Differences and Trends in Employment Demand

1. Office Professionals:

- **Portugal:** There is a high demand for office professionals (6.6% of online job advertisements), reflecting a need for administrative and managerial support across sectors.
- **North Portugal:** The demand for office professionals is noticeably lower than the national average.
- **Implications:** North Portugal may have a smaller concentration of large-scale businesses or administrative hubs compared to the rest of the country. This could imply a focus on more specialised or region-specific industries in the north, such as manufacturing or agriculture.

2. Sales Workers:

- **Portugal:** Sales workers make up a significant portion of the labour market nationally, highlighting the importance of retail and service industries.
- **North Portugal:** Demand for sales workers in the North Portugal region is relatively high, similar to the national average.
- **Implications:** Both Portugal and North Portugal see a heavy reliance on sales and retail sectors. In North Portugal, this could be linked to the tourism industry or localised service industries catering to the population.

3. Personal Service Workers:

- **Portugal:** The demand for personal service workers is high at a national level, indicative of the importance of the service and hospitality industries.
- **North Portugal:** The demand is similarly high, but slightly lower in comparison to Portugal overall.
- **Implications:** Both regions depend heavily on personal services, especially in relation to Portugal's strong tourism industry. However, North Portugal's slightly lower demand may indicate that other sectors, such as manufacturing or technical professions, have a stronger presence.

4. ICT Professionals:

- **Portugal:** ICT professionals are in considerable demand nationally, reflecting Portugal's growing digital economy.

- **North Portugal:** The demand for ICT professionals is lower in North Portugal compared to the national average.
- **Implications:** North Portugal appears to have a lower concentration of technology and digital service industries, which suggests the region may not be a major tech hub. Investment in digital skills training could help this region become more competitive in the growing ICT sector.

5. Legal & Social Professionals:

- **Portugal:** There is a moderate demand for legal and social professionals across the country.
- **North Portugal:** The demand in North Portugal is much lower than the national average.
- **Implications:** The lower demand for legal and social professionals in North Portugal suggests that this region may have less emphasis on professional services and legal infrastructures compared to the rest of the country. This could be due to a more rural or industrial economic base.

6. Metal & Machinery Workers:

- **Portugal:** Metal and machinery workers represent a modest portion of the job market.
- **North Portugal:** Demand for metal and machinery workers is significantly higher in North Portugal compared to the national average.
- **Implications:** North Portugal has a stronger industrial base, particularly in sectors such as metalworking and machinery production. This demand suggests a focus on manufacturing and heavy industry, which may play a crucial role in the region's economy.

7. Handicraft and Printing Workers:

- **Portugal:** There is relatively low demand for handicraft and printing workers across the country.
- **North Portugal:** Demand for these occupations is notably higher in the North Portugal region.
- **Implications:** The region appears to have a stronger focus on artisanal industries, such as textile production, handicrafts, and printing, which may cater to both local and international markets.

2.2 Implications for Economic and Social Development

1. Industrial Base in North Portugal:

- North Portugal's higher demand for metal and machinery workers, along with handicraft and printing professionals, indicates a strong industrial and manufacturing economy. This suggests that regional economic development initiatives could focus on further strengthening industrial output, attracting investments, and modernising existing manufacturing infrastructures.
- **Implication:** Policies should support industrial modernization, investment in automation, and upskilling the workforce to meet evolving demands in these sectors.

2. Shift Away from Service-Based Economy:

- While Portugal overall shows a strong reliance on service sectors like office work, legal services, and ICT, North Portugal appears to have less emphasis on these areas, potentially due to a more rural and industrial makeup. However, there is still significant demand for sales and personal service workers.
- **Implication:** Economic diversification strategies could include encouraging more service-based industries, particularly those related to digital services and technology, to balance the industrial base and create new growth opportunities.

3. Potential for Digital Economy Growth:

- The lower demand for ICT professionals in North Portugal presents both a challenge and an opportunity. By focusing on ICT training and fostering partnerships between educational institutions and the tech industry, North Portugal could attract new businesses and tech start-ups.
- **Implication:** Investment in ICT education and infrastructure could provide a pathway for economic transformation in the region, ensuring it remains competitive in the digital economy.

2.3 Implications for Education and Training

1. Training for Industrial and Technical Skills:

- North Portugal's high demand for metal and machinery workers, along with handicrafts and other technical professions, implies that educational providers should focus on technical and vocational training to support the manufacturing sector.
- **Recommendation:** Vocational schools and technical institutes should offer more specialised programs in areas like machinery maintenance, industrial design, and automation. Training programs should be aligned with industry needs, with partnerships between educational providers and local industries.

2. Emphasis on Service and Sales Skills:

- Given the high demand for sales and personal service workers in both Portugal and North Portugal, education providers should ensure that students are equipped with relevant skills, including customer service, communication, and retail management.
- **Recommendation:** Schools and colleges should focus on soft skills training and incorporate more practical experiences, such as internships in the service and retail sectors, to better prepare students for these roles.

3. ICT and Digital Skills:

- The relatively low demand for ICT professionals in North Portugal suggests a gap in both the supply of jobs and the workforce's readiness for digital careers. Enhancing ICT programs and fostering entrepreneurship in the tech industry could help bridge this gap.
- **Recommendation:** Colleges and universities in North Portugal should expand their ICT and coding programs, and work with the tech sector to create internship opportunities, tech incubators, and innovation hubs that can stimulate job growth in the digital economy.

2.4 Conclusion

The labour market in North Portugal shows a different economic focus compared to the overall Portuguese labour market. North Portugal is more heavily reliant on industrial and manufacturing occupations, particularly in the metal and machinery sectors, while the rest of Portugal has a stronger emphasis on office work, ICT, and legal professions. Addressing these differences through tailored economic, educational, and social development initiatives can help both regions develop sustainably while also preparing the workforce for future demands.

3. Greenness and Green Pervasiveness by Occupation in Portugal (Q1 2024)

The data is on the "Greenness" and "Green Pervasiveness" of various occupations in Portugal using 4-digit ISCO occupations. The concept of greenness is particularly important in understanding how sustainability skills are distributed within the labour market, and green pervasiveness indicates the share of online job advertisements (OJAs) containing at least one green skill. Below is a detailed analysis of the findings and the implications for economic and social development, as well as education and training in Portugal.

3.1 Key Occupation Insights

1. Financial and Investment Advisers:

- **Greenness:** High. Financial and investment advisers incorporate a significant share of green skills, reflecting the growing emphasis on sustainable investments and environmental, social, and governance (ESG) criteria.
- **Green Pervasiveness:** High, suggesting that many job ads for financial advisers now include a requirement for knowledge or experience in green finance.
- **Implications:** As Portugal aligns with global sustainability trends, the finance sector will continue to evolve, focusing more on ESG and responsible investment practices. This demands that education and professional certification programs in finance increasingly focus on sustainable investment, green finance principles, and ESG analysis.

2. Teaching Professionals Not Elsewhere Classified:

- **Greenness:** Moderate to high. Teachers in this classification show a significant level of green skills, especially those involved in sustainability education and environmental sciences.
- **Green Pervasiveness:** High, reflecting the increasing integration of green concepts in education curricula.
- **Implications:** The role of educators in disseminating knowledge about sustainability is critical. Schools and colleges must ensure that teaching professionals are well-versed in green skills, and teacher training programs should emphasise environmental awareness, climate change education, and sustainable development goals (SDGs).

3. Sales Demonstrators:

- **Greenness:** Moderate. Green skills for sales demonstrators likely involve knowledge of sustainable products, eco-friendly materials, or green technologies.

- **Green Pervasiveness:** Relatively high, indicating that many roles now expect sales professionals to understand sustainability trends in consumer goods.
- **Implications:** As consumer preferences shift towards sustainable products, sales and marketing teams must be prepared to communicate the benefits of eco-friendly products. Educational providers should integrate sustainability concepts into business, sales, and marketing curricula, focusing on ethical sales strategies and green consumer behaviour.

4. Electronics Engineers:

- **Greenness:** Moderate. Electronics engineers play a role in the development of energy-efficient devices, renewable energy systems, and sustainable product design.
- **Green Pervasiveness:** Moderate to high, suggesting that the role is increasingly tied to green technologies.
- **Implications:** Engineering education must prioritise green engineering practices, such as designing for energy efficiency, minimising waste, and incorporating renewable materials into product development. Universities and technical schools should offer specialised courses in green electronics and sustainable design.

5. Electrical Mechanics and Fitters:

- **Greenness:** High. This occupation requires skills related to installing and maintaining energy-efficient systems, renewable energy components, and environmentally friendly electrical technologies.
- **Green Pervasiveness:** High, with job ads often focusing on green skills.
- **Implications:** As Portugal continues to expand its renewable energy infrastructure, the demand for skilled electrical mechanics and fitters with expertise in green systems will increase. Vocational training programs should focus on renewable energy systems, such as solar, wind, and energy storage technologies, ensuring that the workforce is prepared for these jobs.

6. Managing Directors and Chief Executives:

- **Greenness:** Moderate. This indicates that green leadership skills, such as knowledge of sustainable business practices and ESG management, are becoming increasingly important for executives.
- **Green Pervasiveness:** Moderate, suggesting that many executive roles now emphasise green business strategies.
- **Implications:** Leadership programs should integrate green management principles, preparing future leaders to guide companies towards sustainability.

Business schools should offer training on corporate social responsibility (CSR), green business models, and ESG reporting standards.

7. Applications Programmers:

- **Greenness:** Moderate. Green skills for programmers are likely tied to energy-efficient software development, optimising systems for lower energy consumption, and supporting green technologies.
- **Green Pervasiveness:** Moderate, reflecting that many programming roles are linked to sustainable software solutions.
- **Implications:** As the digital sector grows, there will be an increasing demand for software that supports sustainability goals. Education in programming should include training on energy-efficient coding practices, as well as developing software for climate data analysis, renewable energy management, and environmental monitoring.

8. Civil Engineers:

- **Greenness:** High. Civil engineers are involved in designing sustainable infrastructure, including energy-efficient buildings, sustainable urban planning, and green transportation systems.
- **Green Pervasiveness:** High, as a significant proportion of civil engineering job ads now emphasise green building practices.
- **Implications:** Civil engineering education must focus on sustainable design and construction practices, ensuring that new infrastructure aligns with sustainability standards. Universities and vocational schools should offer programs in green building certification, sustainable urban planning, and eco-friendly construction techniques.

3.2 Implications for Economic and Social Development

1. Sustainable Economic Growth:

- The data indicates that many high-skilled occupations in Portugal are incorporating green skills, particularly in finance, engineering, and leadership roles. This aligns with global trends towards sustainability and reflects Portugal's commitment to green economic growth.
- **Implication:** Policymakers should continue to support green initiatives, particularly in renewable energy, sustainable finance, and green infrastructure development. Investing in these areas will help create jobs while ensuring that Portugal meets its environmental targets under the European Green Deal.

2. Focus on Green Finance:

- The high level of greenness and green pervasiveness in financial and investment adviser roles shows that sustainable finance is becoming a key driver of Portugal's economy.
- **Implication:** Economic development strategies should include promoting green finance through tax incentives, grants for sustainable projects, and encouraging businesses to adopt ESG practices. By positioning itself as a leader in sustainable finance, Portugal can attract international investment in green projects.

3. Sustainable Infrastructure Development:

- The high demand for green skills among civil engineers and electrical mechanics suggests that Portugal's infrastructure development is moving towards sustainability.
- **Implication:** Large-scale investments in sustainable transportation, energy-efficient buildings, and renewable energy projects will be essential for Portugal's future economic growth. Public-private partnerships in these areas will help drive innovation and job creation.

3.3 Implications for Education and Training

1. Incorporating Green Skills into Vocational and Higher Education:

- As the demand for green skills grows across a range of occupations, educational institutions must adapt their curricula to include sustainability in technical and vocational training.
- **Recommendation:** Vocational schools should offer specialised programs in green technologies, particularly for electricians, mechanics, and engineers. These programs should cover renewable energy systems, energy-efficient construction, and sustainable manufacturing practices. Higher education institutions should also focus on sustainable business models, ESG reporting, and green finance principles in their business and leadership programs.

2. Preparing the Workforce for Green Leadership:

- The importance of green skills among managing directors and chief executives highlights the need for future leaders to be well-versed in sustainable business practices.
- **Recommendation:** Business schools and executive training programs should emphasise green leadership, CSR, and sustainability reporting. Future leaders need to be equipped to guide companies through the green transition and integrate sustainability into their core business strategies.

3. Upskilling in Emerging Green Technologies:

- With green skills becoming increasingly prevalent in engineering and IT roles, there is a need for continuous upskilling to keep pace with technological advancements.
- **Recommendation:** Lifelong learning and professional development programs should focus on emerging green technologies. Engineers, technicians, and IT professionals should be encouraged to participate in training on renewable energy, sustainable software, and eco-friendly product design. Government and industry initiatives should support reskilling efforts to ensure that the workforce is ready to meet the demands of the green economy.

3.4 Conclusion

The labour market in Portugal is undergoing a significant shift towards sustainability, with green skills becoming increasingly important across various high-skilled occupations, including finance, engineering, IT, and leadership. As Portugal continues to transition towards a greener economy, education and training systems must evolve to provide workers with the necessary skills. By integrating green concepts into vocational and higher education, supporting professional development in green technologies, and fostering green leadership, Portugal can ensure a sustainable and prosperous future for its labour market.



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