

MILITARY CAREER STRUCTURES IN WESTERN COUNTRIES. COMPARATIVE ANALYSIS OF THE OFFICER CATEGORY¹

ESTRUTURAÇÃO DA CARREIRA MILITAR EM PAÍSES OCIDENTAIS. ANÁLISE COMPARATIVA AO NÍVEL DA CATEGORIA DE OFICIAL

Paulo Jorge da Silva Ferreira

Engineering Major
Bachelor of Military Engineering by the Military Academy
Logistics' Area Coordinator in the Army's Staff
1149-065 Lisbon
eme@mail.exercito.pt

Abstract

This research aims to ascertain the defining elements of officer career structures in western countries that may be used to improve the Portuguese model. The object of study is the careers of military officers, specifically officers who become Career Personnel after completing an academic degree at a Military University, and who are statutorily qualified to become flag officers. The methodology used relied on a comparative research design based on the interpretation of data collected using traditional documentary research combined with semi-structured interviews.

The research uncovered some differences in mentality between southern European countries and other western countries, with career designs based on Specialties being more prevalent in the first. In addition, Portugal is the only country where the General Staff Course is not considered essential for promotion to flag rank. The research found that the career structure of Portuguese officers can be improved by adopting competencybased career designs rather than Specialtiesbased ones, which resulted in recommendations to restructure the career model in force, although further studies on career management are required.

Keywords: Career Structure, Career Design, Skills.

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¹ Article based on the individual research work undertaken in the Joint General Staff Course of 2016 2017. The defence took place in July 2017 at the Military University Institute.

Resumo

A presente investigação almeja avaliar os elementos identitários da estrutura da carreira dos oficiais das Forças Armadas de países ocidentais, que podem melhorar o modelo português. O objeto de estudo é a carreira dos oficiais das Forças Armadas, focando-se nos oficiais que ingressam nos Quadros Permanentes após a frequência de curso superior em Estabelecimento de Ensino Superior Público Universitário Militar, e que possam estatutariamente ascender a oficial general. Metodologicamente, materializa-se um desenho de pesquisa comparativo, assente na interpretação de dados recolhidos por pesquisa documental clássica e entrevistas semiestruturadas.

A pesquisa demonstra haver uma mentalidade distinta entre os países da Europa meridional e os restantes países ocidentais, com ênfase nos primeiros de desenhos de carreira assentes nos Quadros Especiais. Para além disso, verifica-se que apenas em Portugal a frequência do Curso de Estado-Maior não é encarada como sendo essencial para uma futura ascensão à subcategoria de oficial general. A investigação conclui que a estrutura de carreira dos oficiais nacionais pode ser melhorada, com a adoção de desenhos de carreira centrados nas competências e não nos Quadros Especiais, pelo que culmina em recomendações para reestruturação de carreiras e também, com um maior detalhe relativo à gestão de carreiras.

Palavras-chave: *Estrutura de Carreira, Desenho de Carreira, Competências.*

Introduction

In the beginning of the current decade, Portugal was forced to request international financial assistance. Concurrently, the military underwent a structural reform², which involved adjusting the defence spending ratio to 1.1% of the Gross Domestic Product (GDP), resizing the Armed Force (AAFF) staff, and reviewing the main applicable legal instruments, including the Statute of the Armed Forces Military Personnel, (EMFAR) which was revised by Decree-Law No. 90/2015 of May 29, restructuring the military career.

However, the Arab Spring, the resurgence of the Islamic State, the Ukrainian crisis, and the migrant issue changed the geopolitical framework, with direct implications for defence and security. The North Atlantic Treaty Organization (NATO) reflected on these issues at its 2014 Wales Summit, where it was agreed that countries with defence expenditures under 2% of the GDP should reach that mark within a decade.

With the Wales summit and the recently enacted EMFAR, the weight of staff expenditures in the budget of the three branches of the AAFF will launch a new discussion about

² The reform known as “Defence 2020” defined a new National Defence model that envisaged a more modern, more operational, and more sustainable Armed Forces, supported by a coherent organised conceptual and legislative framework, with optimised resources and clear increases in structure efficiency (CM, 2013).

the restructuring of officer careers. Therefore, the new elements must be analysed and compared to other military realities in order to identify lines of action to streamline future restructurings.

The object of this research is the career of Armed Forces officers, and the research was geographically delimited to western countries³ with NATO membership and Defence Attachés in an accredited embassy in Portugal. The research focuses on the career structure of career personnel (CP) officers on active duty in the organisational structure of the AAFF⁴ and similar institutions in the sample of countries analysed. Furthermore, the research focuses only on Specialty (S) officers who become CP after completing a degree in a Public Higher Military Studies Institution [Estabelecimento de Ensino Superior Público Universitário Militar] (EESPUM) for which a previous academic degree was not required, and who can statutorily be promoted to flag officer. Thus, the sample consists of: Portugal, Spain, France, Italy, the Netherlands, Belgium, Germany, and the United States.

The general objective (GO) of the research is to evaluate the key elements in the career structure of AAFF officers in western countries that could be used to improve the Portuguese model. The following specific objectives (SO) were defined to operationalise the GO:

- SO1 – To analyse the career structure of AAFF officers in Portugal and in other western countries;
- SO2 – To analyse how the mechanisms that regulate the careers of AAFF officers in Portugal and in other western countries influence career progression;
- SO3 – To assess alternative ways of restructuring the careers of Portuguese AAFF officers.

The research used a largely inductive method based on a qualitative research strategy and a comparative research design. Research shows that southern European countries prefer career designs based on S. Thus, the research revealed that the Portuguese officer career structure can be improved by radically changing the paradigm, notably through the adoption of competency-based career designs.

This paper is organised in four parts. It begins by outlining the conceptual framework and explaining the methodology used. In parts two and three, the career structures of AAFF officers and the impact of regulatory mechanisms on career development in the different models used in western countries are analysed. In part four, the alternative ways of restructuring the Portuguese military career are assessed. The paper ends by presenting conclusions, including a proposal for a career structure model for Portuguese CP officers.

³ For Huntington, the west includes part of Europe, North America, Australia, and New Zealand.

⁴ With the exception of military law enforcement and coast guards.

1. Literature review

1.1 Research problem

To achieve the GO, the following Research Question (RQ) was formulated: How can the defining elements of the officer career structure in other western countries improve the Portuguese model?

This RQ led to three Subsidiary Questions (SQ):

SQ1 – What are the defining elements of the career designs in force in the Portuguese AAFP and in the AAFP of other western countries?

SQ2 – What are the main regulatory mechanisms of the officer career in the Portuguese AAFP and in the AAFP of other western countries?

SQ3 – How can the structural and regulatory elements of the career models of AAFP officers in other western countries be adapted to the Portuguese military career structure?

1.2. State-of-the-art

Over recent years, two comparative studies were conducted on the military careers of national and foreign military officers. One of these studies (Moura, 2014) broadly compared the career models of CP officers in the Portuguese AAFP and in the AAFP of allied countries according to three dimensions: Career Management and Professional Development Policies, Training and Qualification, and Evaluation Systems. Another particularly noteworthy study, in light of the new EMFAR, compared the career management mechanisms used in friendly countries with the Portuguese model (Alexandre, 2016). The study proposed several measures, including a performance evaluation system that would involve various bodies and mentoring mechanisms. Prior research has either focused on structuring, planning, and managing the careers of AAFP officers as a whole, or on specific dimensions. Therefore, the CP officer career structure and the main regulatory mechanisms⁵ that influence it were not investigated specifically, nor in-depth.

1.3. Conceptual framework

1.3.1. Career

The term “career” can be defined as the “evolving sequence of a person’s work experiences over time” (Arthur, Hall, and Lawrence, 2004, p.8). Schein argues that career development is the “interaction of the individual and the organisation over time” (1978, p.2). Thus, the motivations, skills, and competencies of individuals within an organisation are constantly changing, and the organisation also has to adapt cyclically to external constraints. Schein

⁵ There is no legal definition for what constitutes a regulatory mechanism for careers. However, the wording of Article 126 of the EMFAR implies that it is a statutory career management measure devised to harmonise the needs of the AAFP with the skills and interests of military personnel.

asserts, then, that career consolidation takes place between what he calls the 30 year-crisis and mid-life crisis (1978, cited in Dutra, p. 36). Therefore, it can be inferred that career consolidation usually occurs between 30-40 years of age.

According to Rosenbaum, the dialectic between the individual and organisational levels in career development can be summed up in two stances (2004, p.329):

- Individualistic: individuals are the main agents determining their job progress;
- Structural: individual careers in organisations are structured according to the vacancies available and the policies in place.

These two models can be seen as opposing poles of the career development spectrum, and are based on the concepts of protean and organisational careers⁶.

In military institutions, career development models can be divided into four types (Thie and Brown, 1994, pp.78–82):

- Up-or-Out: Entry at the start of the military career and forced or induced separation on the basis of regulatory mechanisms such as age, length of service, or failure to progress in grade. Used when the objective is a young and vigorous officer corps.
- Up-and-Stay: Entry at the start of the military career and continuation regardless of vertical progression.
- In-and-Out: Lateral entry and exit at multiple points in careers.
- Mixed.

1.3.2. Career structure

Career development consists of the practical aspects of a dynamic process that sets in motion a more static base, career structure, through management mechanisms/regulators. According to Dutra (2012, pp.71–81), career structure includes two components that interact with one another:

- Enhancement/differentiation system: adding value to the different types of jobs and different levels of training;
- Career Design: A logical sequence of positions/posts that can take many forms⁷.

⁶ According to Hall (2002), protean careers are based on a philosophy of individual creation in which career progression choices are made by individuals, while organisational careers are fully managed by the organisation through directives/policies and the functional/temporal expectations of individuals.

⁷ Linear career paths (in which each step corresponds to a specific set of responsibilities and duties, with the top positions in the career being reserved for administration/managerial positions, which are not accessible to technical careers); network career paths (each position corresponds to several options, allowing a person to choose their own career path); and parallel career paths (there is a predetermined sequence of positions that can be filled by a person in an organisation, which is geared towards professional/technical and/or managerial paths, where the highest remuneration levels are guaranteed in both directions).

1.3.3. Competency

Competency can be described as “(...) having both the knowledge and the behavioural skills to act appropriately” (Santos, 2014, p.20). Boyatzis (cited in Rodrigues, 2015, p.13) offers a broader conception, defining competency as “the set of attributes of a person that leads to an effective or superior performance, that is, their characteristics, motives, traits, skills, self-image, or body of knowledge” .

2. Research methodology

The research used an inductive method that involves the analysis of the variables that comprise the career structures of CP officers in western countries. Figure 1 shows the relationship between those variables.

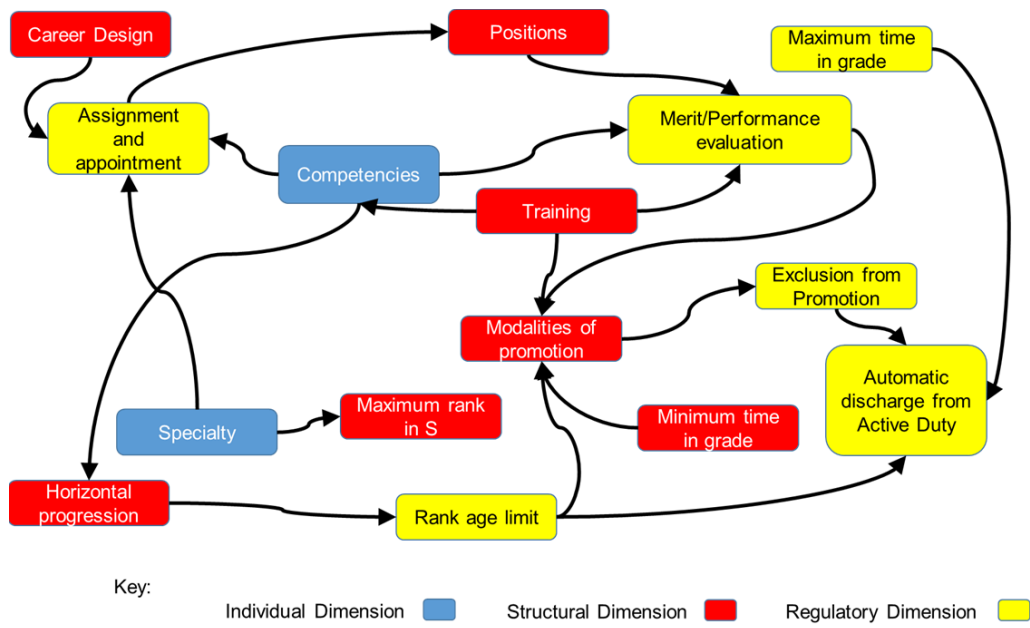


Figure 1 – Relationship between variables

Training, maximum time in grade, S, and career design are independent variables, while automatic discharge from active duty and maximum grade are pure dependent variables. The remaining are intervening variables.

The investigation concludes with the answer to a RQ supported by three SQ, and with the proposal of measures to restructure the military career in Portugal. To answer these SQ, it was necessary to interpret data on the elements that characterise or identify the careers of CP officers in Portugal and other western countries.

The career structures of CP officers from western countries have been characterised using a traditional method of data collection - documentary research. To complement this research, data were collected using non-participant observation, through semi-structured interviews conducted with defence attachés accredited in Portugal. This analysis enabled the development of a career structure model based on the careers of Portuguese AAFP officers combined with elements from other countries.

The model was then tested using non-participant observation through semi-structured in-depth interviews. Multiple-case sampling was used to ensure representativeness, specifically by contrasting “[...] at least 2 cases from each group of relevance to the research object” (Guerra, 2014, p.45). Thus, the sample consisted of two types of flag officers from each branch of the AAFP: one officer whose S requires an OF-9 grade⁸, and one whose original S limits vertical progression to the OF-7 grade, referred to as, respectively, type A and type B officers. Thus, the Type A flag officers subcategory included the Head of the Resources Division of the Armed Forces General Staff, the Personnel Directors of the Navy and the Air Force (PD), and the Director of Human Resources Administration (DHRA) of the Army, given the career regulation/management responsibilities held by these flag officers. In order to provide contrast, three interviews were conducted with Type B⁹ flag officers. Thus, the interviews conducted with these officers are considered representative of their universe.

3. Career Structures Of Career Personnel Officers

3.1. Portugal

There are no S common to all the branches of the Portuguese AAFP, and the military career is understood as a “hierarchical sequence of ranks that progress according to categories, which takes the form of specialties, which in turn correlates with the performance of positions and the exercise of specific duties” (MDN, 2015, p.3205). Careers are not classified according to different types, but each S has specific rules regarding top ranks and the performance of specific positions/duties, which are defined in a Staff Plan (SP). The Portuguese career design is thus a linear one, although there is the possibility of small temporary/exceptional deviations. There are general and special criteria for promotion, which are based mainly on minimum time in grade, the performance of certain mandatory positions, and mandatory training. There is also the possibility of horizontal career progression, primarily geared towards the performance of “positions and the exercise of duties in areas requiring a high degree of specialisation” (MDN, 2015, p.3198). Through this statutory mechanism (currently unregulated), officers remain in the same position but progress in terms of remuneration. The dynamics of the Portuguese military career (which are summarised in the graphic in Figure 2) include a turning point in an officer’s career, which can be either voluntary or compulsory, and which will lead to either horizontal progression, transition to the reserves, or retirement.

⁸ Grades will be identified by their respective NATO codes (NATO, 2010).

⁹ In order to standardize the sample, the Naval Administration, Military Administration, and Aeronautical Administration S were analysed.

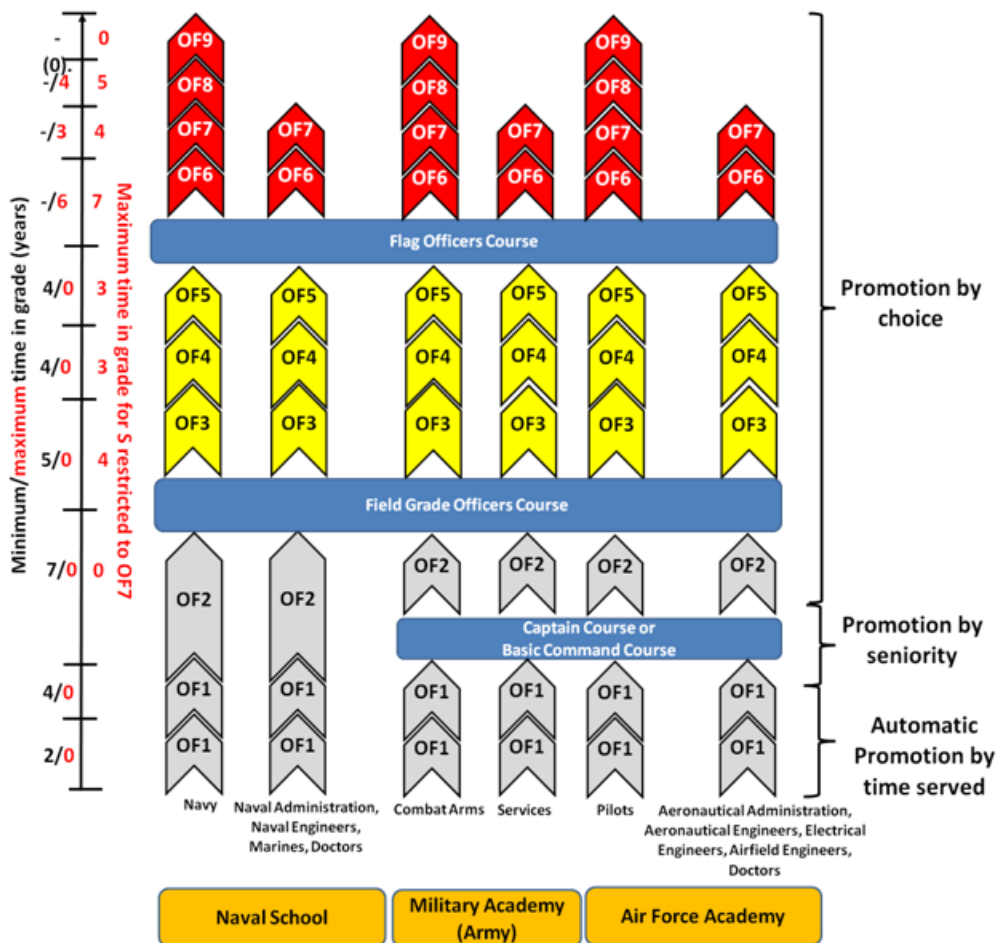


Figure 2 – Dynamics of the Portuguese military career

Source: Prepared from MDN (2015)

3.2. Spain

The branches of the AAFP integrate several Corps/*Cuerpos*¹⁰, which are divided into specialties. Career progression¹¹ and career types are strongly linked to each Corps, and only officers from the *Cuerpos Generales* are eligible for grades higher than OF-7. Therefore, Spain also has a linear career design in place. In spite of this, the performance of some positions leads to career reorientation, and the OF-3/OF-4 grades (in all Corps) are a turning

¹⁰ There are also Corps common to all the branches.

¹¹ Similar to the *Cuerpos Generales* and *Infantería de Marina*, which are different from the *Cuerpos de Intendencia* and *Ingenieros* career paths.

point associated with the acquisition of an Academic Degree¹². Progression to OF3 and OF6 requires attending refresher courses at the *Escuela Superior de las Fuerzas Armadas*, as shown in Figure 3.

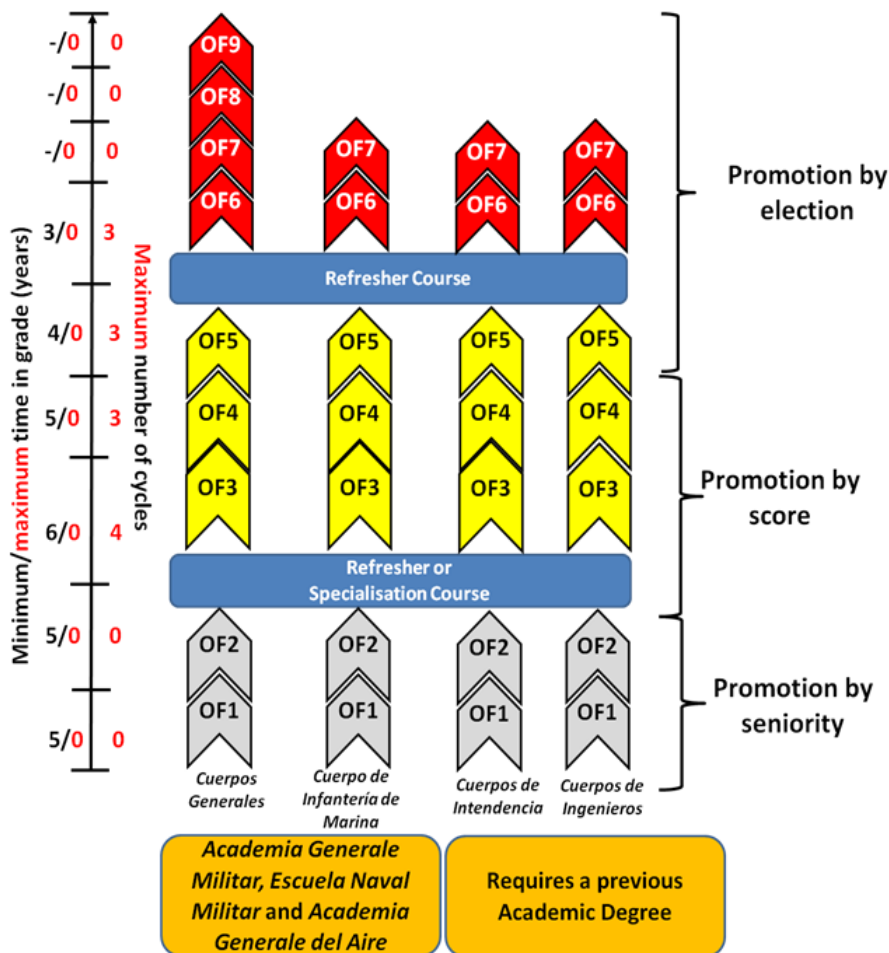


Figure 3 – Spanish Career Dynamics

Source: Adapted from Jefatura del Estado (2007a) and Ministerio de Defensa (2009b, 2010, 2011a).

In order to qualify for promotion, officers must have a minimum time in grade and exercise certain duties for a predetermined period of time (Ministerio de Defensa, 2009b). Although a horizontal career design in Public Administration has been foreseen (Jefatura del Estado, 2007b), it has not yet been legally adapted to the Spanish AAF.

¹² Such as, for example, the General Staff course, the Information or Administration courses for the *Cuerpos Generales*, and a refresher course for the remaining Corps.

3.3. France

The AAFF branches are divided into Corps/Specialties¹³ strongly associated with career types, and there is an ideal career orientation/path that theoretically allows one to reach the top positions of the French military hierarchy. Each position corresponds to different salary levels and officers progress according to time in grade and available vacancies, thus there is no actual horizontal progression.

The French career is essentially divided into two parts. The first part goes up to OF-3 and the second begins at that grade. Only a few officers are admitted into the second part, and thus have greater chances of vertical progression. The officers who enter this part of their careers must choose a Competency Area¹⁴, which requires obtaining a military university degree, equivalent to the Portuguese JGSC [Joint General Staff Course], from the *École de Guerre* (Ministère de la Défense, 2015, pp.15, 33). A transfer to other areas may occur at the officer's request or due to unsuitability, but vertical progression is limited (Queffelec, 2017). Therefore, there is a parallel career design in place, in which there is no differentiation among S and access to the highest ranks of the military hierarchy is not restricted. The specific statutes of each branch determine the criteria for promotion¹⁵. The dynamics of the French career are summarised in Figure 4.

3.4. Italy

The branches of the Italian Armed Forces are divided into Corps/Arms¹⁶, which are composed of officers who obtain a military university degree in the *ruolo normale*. Career types are strongly linked to the Corps/Arms, and the top positions of the military hierarchy dependent entirely on them, in a linear career design. Minimum time in grade, the positions/duties to be performed, and approval in training activities have been defined as criteria for promotion for each position and Corps/Arm, as summarised in Figure 5.

In the Army, officers must complete the Joint General Staff Course to be promoted to OF-3, and in the Air Force they must complete the OF-5 Promotion Course. For OF-3 officers, attending Advanced General Staff Courses¹⁷ is an advantage in terms of vertical progression and appointment to positions/duties (Presidente della Repubblica, 2010). In practice, attending those courses is a decisive factor in flag officer promotions (Stasolla, 2017).

¹³ There are also Corps common to all the branches.

¹⁴ Operations, Sustainment, Finance, Human Resources, Communications and Information Systems, Information, and International Relations.

¹⁵ Minimum/maximum time in grade, age limits, academic qualifications, and performance of duties.

¹⁶ There are no Corps common to all the branches.

¹⁷ Equivalent to the Portuguese JGSC, but different from the *Esercito*/Army Staff Course, which is a Promotion Course.

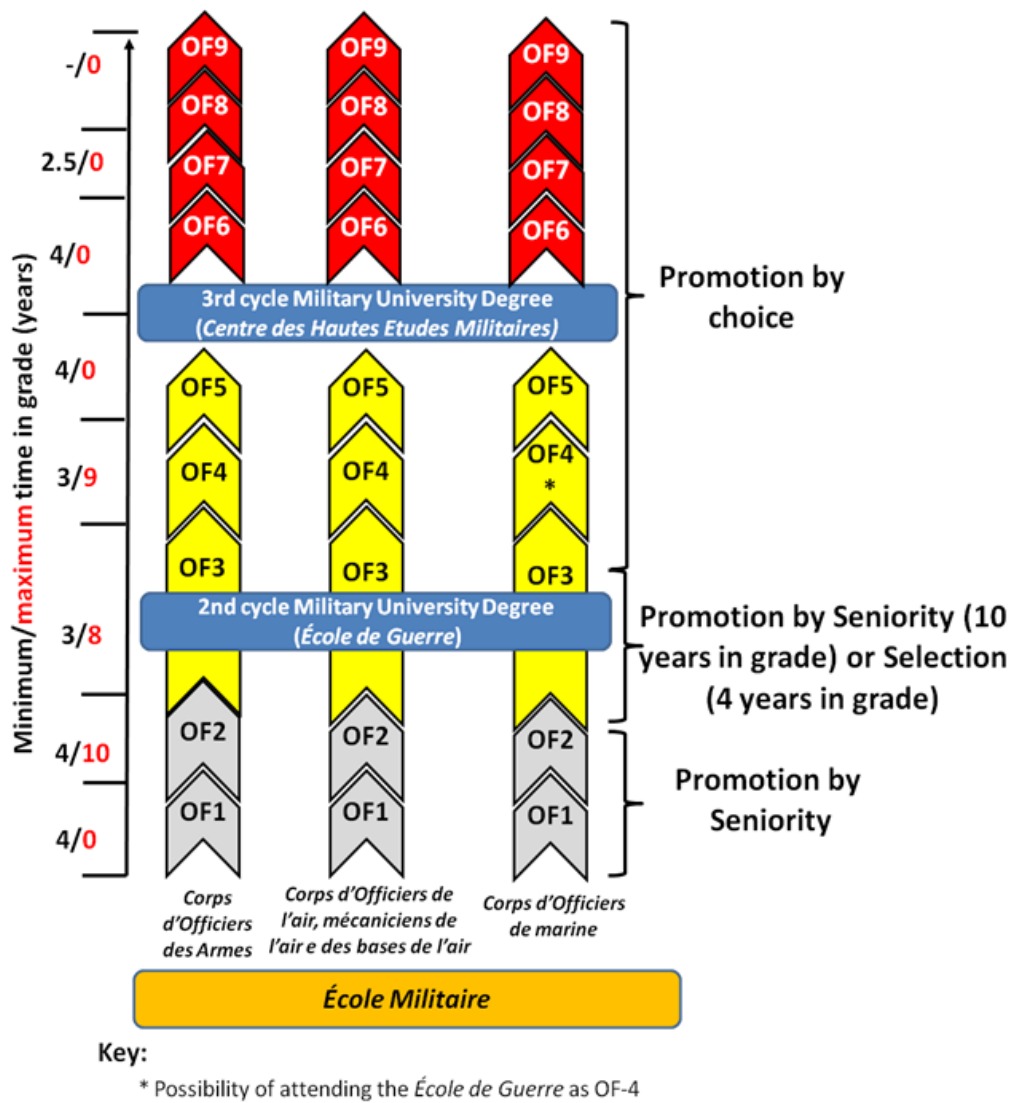


Figure 4 – French Career Dynamics

Source: Adapted from Ministère de la Défense (2008a; 2008b; 2008c, 2015).

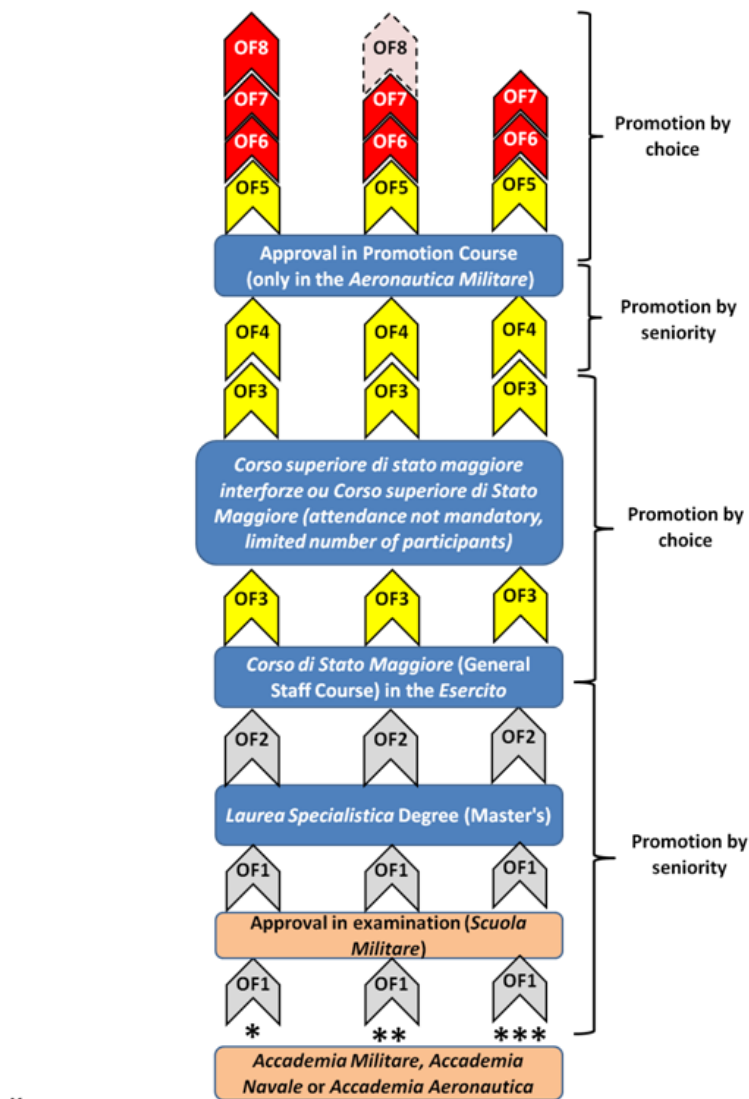


Figure 5 – Italian Career Dynamics

Source: Adapted from Presidente della Repubblica (2010).

3.5. Germany

The AAFP¹⁸ are divided into specialties and officers perform specific positions in the first 13 years of their career. Rank restrictions are not based on Specialty, but rather on type of career design, thus a parallel career design is in place, which does not foresee horizontal progression. Generally speaking, there are essentially two main types of careers (Taube, 2017): the first type includes officers who completed the Advanced General Staff Course and the second includes officers who did not attend this course (those who do not attend the course usually see their military careers capped at OF-4).

As shown in Figure 6, training plays an important role in the career design of German officers, who must complete specific courses before taking on command duties. Completion of the General Staff Course is also a requirement for promotion to OF-2-OF-3. The scores obtained in this course greatly influence the selection of officers for the Advanced Staff Course, and are, in practice, a sine qua non condition for promotion to flag officer at a later stage of the career.

3.6. Netherlands

The branches of the Dutch Armed Forces are divided into Arms/Services/Specialties. The system in force is the Flexible Personnel System (FPS), which is based on an uporout system with three consecutive qualifying phases (FPS1, FPS2, and FPS3) that correspond to basic training, progression up to OF-2, and progression after OF-2. Six years after promotion to OF-2 a committee determines which officers will progress to FPS3 based on their assessments and on the merit and potential shown, and those who progress will be able to continue their career until they reach retirement age. The OF-3 officers¹⁹ with the greatest potential are admitted into the General Staff Course, which is informally known as the "Generals Course" (Jansen, 2017).

In the grades below OF-3, officers must perform positions specific to their Specialty, and only perform general positions on an exceptional basis. From OF-4 grade onwards, officers can perform positions regardless of Specialty. However, officers may specialise and follow a different career design from their original Specialty since promotion criteria are defined in terms of number/type of positions²⁰ rather than in terms of minimum time in grade, and a maximum time in grade/age is not defined. Although the legislation does not specify any restrictions regarding maximum rank based on Arm/Service/Specialty, in practice, ranks equivalent to Chief of General Staff of the Armed Forces are limited to officers with operational careers (Poortman, 2017). Thus, in the Netherlands, the FPS2 phase corresponds to linear career designs and the FPS3 phase corresponds to parallel career designs. The Dutch career dynamics are summarised in Figure 7.

¹⁸ Which also include the Joint Support Service and the Joint Medical Service.

¹⁹ With a maximum age of 48 years.

²⁰ Normally three for each rank (Veerman, 2017).

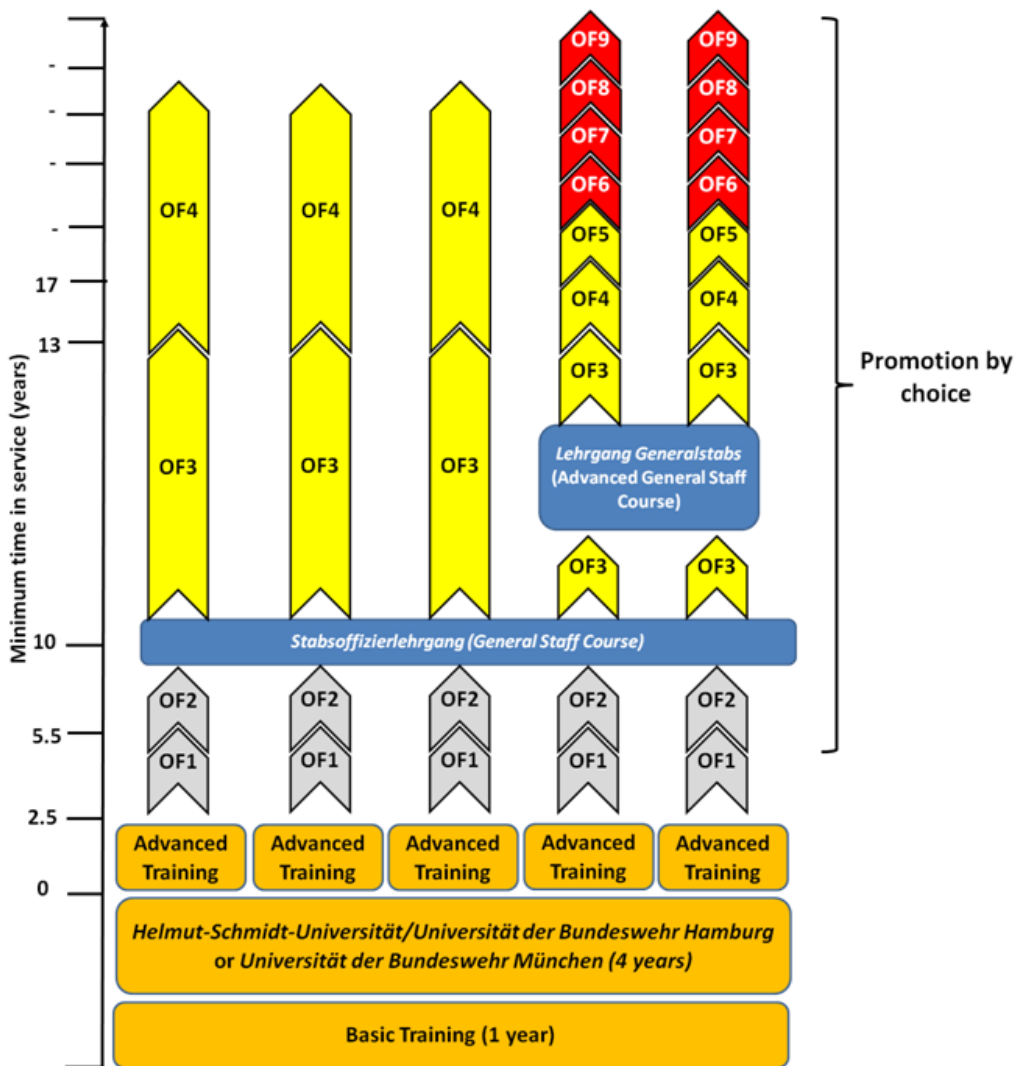


Figure 6 – German Career Dynamics

Source: Adapted from Taube (2017).

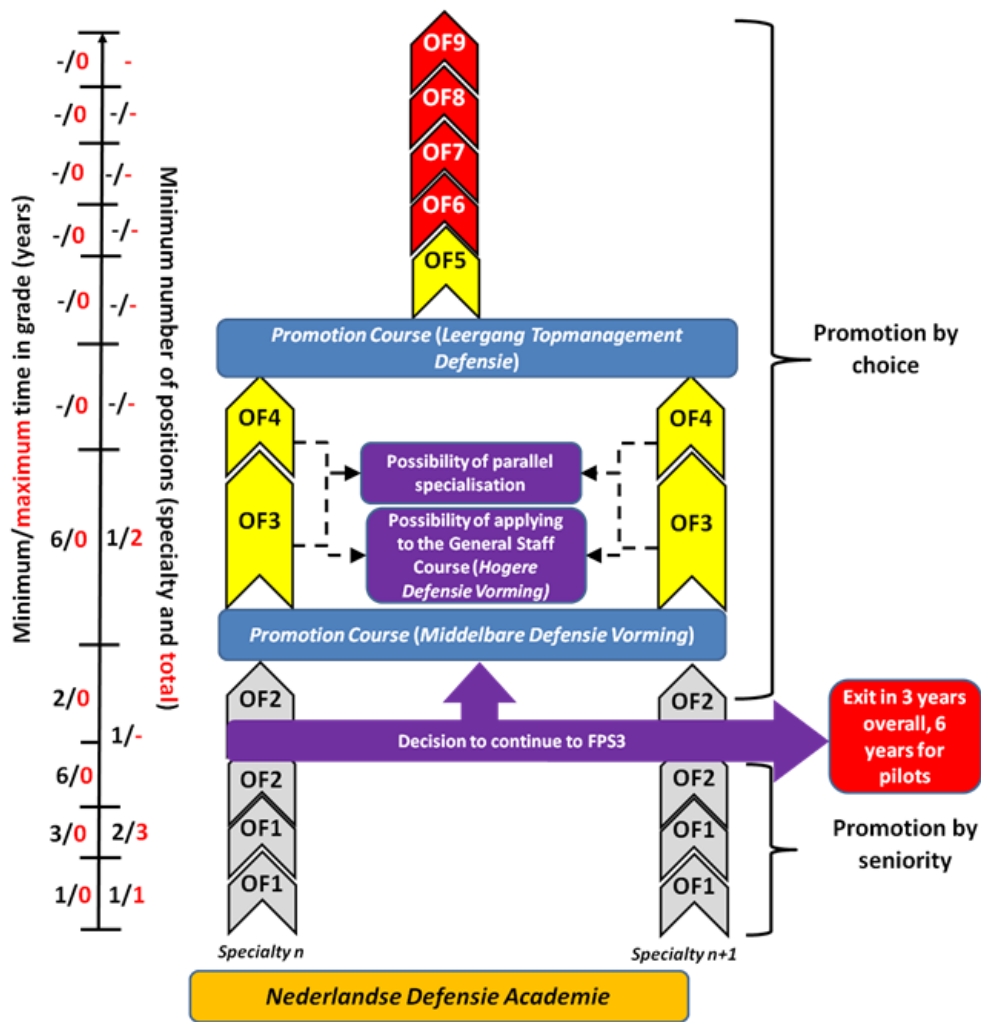


Figure 7 – Dutch Career Dynamics

Source: Adapted from Jansen (2017), Poortman (2017) and Veerman (2017).

3.7. Belgium

Until 2013, officers were linked to a Corps/Specialty within each branch of the AAFB, and were integrated in *Filières de Métiers* (FM) that combined activities that were functionally similar, according to the officer’s basic training. Since then, officers are only linked to FM.

There are two distinct phases in the Belgian military career (Ministère de la Défense, 2007): the *Carrière Militaire Initiale* (CMI) and the *Carrière Militaire Continué* (CMC). The first phase begins with basic training in an EESPUM and ends at OF-2 grade. Afterwards, a *Processus d’Orientation* occurs in which the AAFB comes to an agreement with the

officer, who will either continue service as a flag officer or terminate the collaboration. In the CMC, officers can integrate *Pôles de Compétence* (PC)²¹. Therefore, there are several types of careers, integrated in either FM or PC, depending on the officer's competencies, and there is the possibility of transitioning between FM, PC, and FM-PC. Thus, in Belgium a parallel career design is in place, based on a portfolio of competencies, and top positions are not restricted to certain Corps/Specialties or FM.

Unlike promotions to flag officer, promotions from OF-1 to OF-2 and from OF-2 to OF-3 require mandatory training²². However, in practice, in order to be integrated into a PC, officers must attend a third course of studies²³, and a fourth course of studies²⁴ is required for high-level direction positions or international positions (Dubois e Humfryes, 2017). Although horizontal progression is not the exact equivalent of the Portuguese model, all Belgian officers can refuse a promotion, a decision which is irrevocable (Ministère de la Défense, 2007). Figure 8 shows the Belgian career dynamics.

3.8. United States

The branches of the AAFP are divided into specialties, and there are several types of careers grouped according to 150 profiles, which in turn are grouped into 23 career areas or functional areas (FA) (Department of Defense, 2017). Upon completing their basic training, officers choose a Specialty, but from OF-2 grade onward they may request a transfer between specialties within the same FA, or even between different FA (Department of the Army, 2014, p.10) through the Voluntary Transfer Incentive Program (VTIP). No maximum rank has been defined for FA/specialties, but in practice operational careers are preferred (LeMasters, 2017). Therefore, we are in the presence of a parallel career design.

For promotion to OF-6 grade, a board must recognise the officer as "Joint Qualified", through attendance of a joint course and the performance of joint duties. Although horizontal progression is not an official process, officers may refuse a promotion, resulting in possible consequences that stem from the up-or-out mechanisms in force regarding maximum time in grade. Figure 9 shows the US career dynamics.

²¹ The various PC are: *Analyse et exploitation du renseignement et sécurité, Budget et finances, Gestion des ressources humaines et organisations, Gestion des ressources matérielles et de l'infrastructure, Image et relations publiques, Opérations "joint and combined", Affaires politiques et militaires, Milieu et prévention e Gestion générale* (Ministère de la Défense, 2013).

²² The *Formation de Base d'État-Major* and the *Formation de Candidat Officier Supérieur*, respectively.

²³ The *Cursus Supérieur D'État-Major* or the *Cursus Supérieur D'Administrateur Militaire*, which are accessible to OF-3 and OF-4 officers, equivalent to the Portuguese CEMC.

²⁴ The *Haute Études de la Défense* course, which is accessible to OF-5 or OF-4 officers with a minimum seniority of three years.

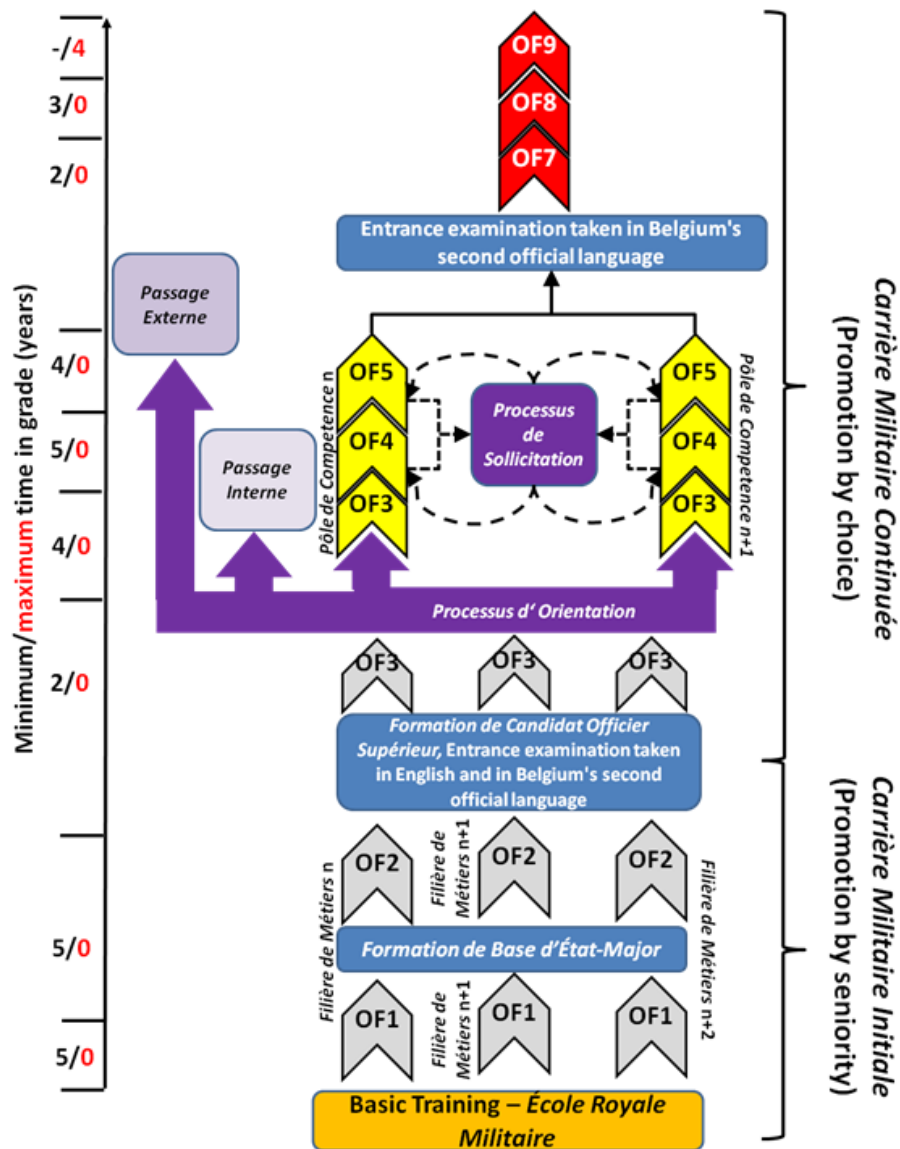


Figure 8 – Belgian career dynamics

Source: Adapted from Dubois and Humfries (2017).

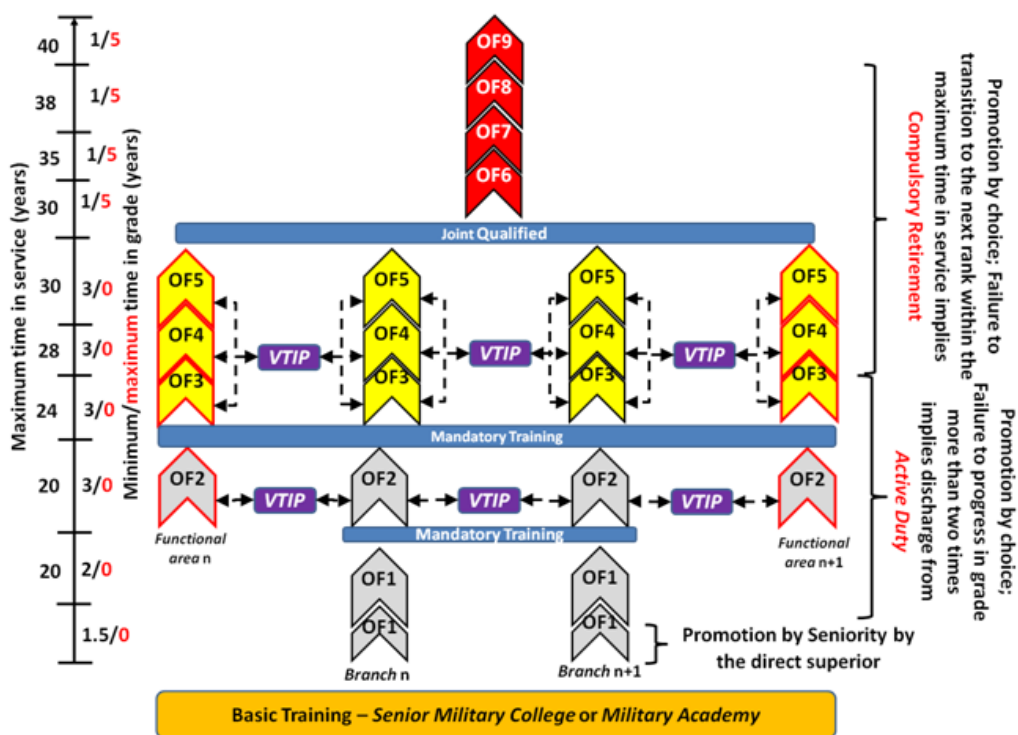


Figure 9 - US career dynamics

Source: Adapted from House of Representatives (2011).

4. Regulatory mechanisms in the career structure of permanent staff officers

4.1. Portugal

The *Regulamento da Avaliação do Mérito dos Militares das Forças Armadas* [Regulation for the Merit Evaluation of Armed Forces Officers] (MDN, 2016) defines the system to evaluate military performance as a mixed process, combining quantitative and qualitative methods of evaluation. Thus, from a quantitative point of view, in addition to an individual assessment, the system includes other elements that are evaluated quantitatively. As for qualitative evaluation, the above regulation includes an assessment of the officer's potential, and allows officers to have a say on their career design. Regardless, the process is essentially a quantitative one.

Placements are determined centrally by the governing bodies of the branches; however, appointments to a specific position vary by branch. While in the Army this is the responsibility of the commanders of a Unit, Establishment, or Body (U/E/B), in the Navy/Air Force they are usually decided by the personnel directorate. Career progression in the military, therefore, is essentially structural, that is, military careers must be highly organisational.

Mandatory transition from active duty to reserve status occurs due to maximum age in grade policies, with the exception of S, and the age limit for retirement is set at 65 years of age across the board. Although essentially Up-and-Stay, the Portuguese military career includes some Up-or-Out elements such as ineligibility for promotion due to failure to qualify for selection for periods of two, three, or four years, depending on rank. Therefore, the system in Portugal is a Mixed system.

4.2 Spain

Promotion assessments are carried out by assessment bodies/boards, and are essentially quantitative, involving the application of weighting coefficients. Appointments to positions are the responsibility of the human resources departments of each branch. These positions are usually distributed by discretionary appointment or according to seniority²⁵, but also through volunteering/application or through a *concurso de méritos* (Jefatura del Estado, 2007a). A list of vacancies is published every year, and minimum and maximum times in position have been defined (Ministerio de Defensa, 2011). The Spanish model of military career progression is predominantly organisational.

Officers are excluded from promotion if they exceed the maximum number of cycles in their grade. If the assessment boards deem an officer ineligible for promotion more than two times, they are permanently excluded from promotion and remain in the same rank until they reach the age of transition to the reserves (Ministerio de Defensa, 2009a). There are no age limits, nor a maximum time in grade. Regardless of the corps to which they belong, at the age of 61 career officers automatically transition to reserve status, and at 65 they retire. Therefore, the Spanish military career is Mixed, albeit predominantly Up-and-Stay.

4.3. France

The annual officer evaluation process begins with an interview with the first evaluator in which clear, quantifiable, and feasible objectives are established (État-Major des Armées, 2013). Overall, officer performance assessments are qualitative, and do not involve mathematical weighting of the various parameters. Appointments to positions are determined centrally by the Personnel Directorate of the branches, although a career manager (Queffelec, 2017) may also be involved in the process, with career guidance initiatives being defined in the fourth year in the OF-2-OF-5 grades (Ministère de la Défense, 2015, p.29). Therefore, military career progression in France is predominantly organisational but includes mechanisms that bring it closer to the protean model.

The direct retirement age is 60 for flag officers and 59 for all other service members (Queffelec, 2017). However, the age limits are higher for some of the more technical specialties. The French system is essentially Up-and-Stay.

²⁵ Respectively, *libre designación and provisión por antigüedad*.

4.4. Italy

Officers are evaluated every year by three evaluators in their chain of command, and the assessment is both qualitative and quantitative (Stasolla, 2017). In voluntary promotion processes, promotions are determined by committees who rank the officers according to an individual merit score. Officer appointments are determined centrally by the upper echelons of each branch, after which the unit/base commander distributes the positions according to each officer's competencies (Stasolla, 2017). The Italian military career is therefore largely organisational.

A maximum number of officers in each rank are defined for each Corps/Arm, as well as voluntary promotion cycles²⁶. Age limits are defined for each rank and Corps/Arm²⁷, after which officers are entitled to a retirement pension. The Italian system can be considered Up-and-Stay.

4.5. Germany

Individual evaluations are conducted every two years, consisting of a qualitative assessment of the officer's potential, which focuses on results and observed behaviour. This assessment influences the officer's next appointment and the order for promotion to the next grade.

As a rule, appointments to positions are centrally determined by the human resources departments of each branch, and here, too, attendance of the Advanced Staff Course is an advantage. In fact, an officer in the Military Police Specialty who holds the *Lehrgang Generalstab* could, in theory, command battalions in another Specialty, something that does not occur in practice due to both the career design in place and common sense (Taube, 2017). A career manager is available to advise officers on their career progression. The German military career design is therefore predominantly organisational.

Exclusion from promotion does not entail compulsory discharge from service. Age limits are defined for each rank and when those limits are reached officers transition to retirement status. The German system is thus Up-and-Stay.

4.6. Netherlands

Officers undergo an annual performance assessment, which is made official through an electronic platform, *PeopleSoft*, and there is one formal assessment at least once in each rank, which is essentially descriptive (Veerman, 2017). The military careers of Dutch officers are seen as a long-term contract, and there is no CP, exactly, but rather officers who serve until they reach retirement age. Therefore, the system in force is Up-or-Out. This promotes quality among officers by allowing them to progress successively to the

²⁶ For example, a four year cycle is defined for the Navy's *Corpo di Stato Maggiore* OF-5 grade, with five promotions taking place in the second, third, and fourth years (Presidente della Repubblica, 2016).

²⁷ It should be noted that logistical and technical careers are longer, but are barred from the highest ranks of the hierarchy.

various FPS phases. Officers who successfully transition to FPS3 are grouped into two categories (Poortman, 2017). In the first category²⁸, position appointments are determined by a committee that immediately defines the positions that must be performed in order to reach the maximum rank. The remaining positions can be applied to through *PeopleSoft*, and the process is conducted in close collaboration with the officer's Career Coach (Veerman, 2017). Thus, the current model in the Netherlands is Protean. The retirement age is currently 58, although an extension to 62 is under way.

4.7. Belgium

Officers are evaluated annually on how well they accomplished the goals set in the job description for their position. The evaluation does not involve multi-criteria mathematical weighting.

The *Processus d'Orientation* precedes the CMC by three years before promotion to OF-3. A selection committee proposes officer transfers to the CMC by *passage interne*²⁹ or *passage externe*³⁰, and officers may express their preference in terms of FM/PC and function. If the officer does not accept, two more proposals are made, and if the last one is not accepted, the officer automatically transitions to *passage externe* (Ministère de la Défense, 2007). Appointments to positions are determined centrally by the senior structure of the branches through the FM and PC, although officers in the OF-4 and OF.5 grades can apply to certain positions through the *Processus de Sollicitation*. The Belgian model is thus predominantly Protean.

Officers who are not promoted after seven assessments by the promotions committee stay at that rank until retirement. There is no defined maximum age or maximum time in grade, but the CMI ends at the age of 46. Thus, the Belgian system is Up-and-Stay.

4.8. United States of America

Performance assessments are fundamentally qualitative and cover the period of time spent in a given position. The process begins when the officers are informed of their performance goals by their direct commanders, followed by a rigorous continuous/periodic counselling process. Appointments/assignments are centralised in the governing bodies of the branches, and career managers liaise with the officers from the outset and guide them to a specific career design, helping them improve their performance and make career choices (Department of the Army, 2014, p.2). The North American model is thus predominantly Protean.

There are set criteria for progression to certain positions, such as maximum time served, as well as a maximum number of promotion rejections, after which the officer is

²⁸ Which is composed of the officers with greater potential.

²⁹ The officer transitions to Defence State agent status.

³⁰ Discharge from the AAFP.

automatically discharged from the AAFF, in an Up-or-Out system. However, a Committee may select some officers for a career extension (Kapp, 2013, p.12; House of Representatives, 2011, p.267). Automatic retirement for grades below OF-6 is at 62 and for grades above OF-6 the retirement age is 64.

5. Alternative ways of restructuring the careers of career personnel officers

5.1. Creating the initial model

The initial career structure model was inspired by the logic used in the majority of western countries analysed, since it defines career types that are not closed to a given Class/S. The aim is to channel officers with potential to specific professional areas while allowing them to consolidate their careers during the transition from OF-2 to OF-3³¹. In light of the above, the career structure was divided into three phases:

- Initial Career: from the end of basic training to the captain and junior officer sub-categories. In this phase, officers perform several duties/positions specific to their S, in a linear career design. This phase ends with the assignment of each officer to a FA³², as well as to a specific Competency Profile, after a process designed to assess their strengths and personal ambitions, and how they fit the needs of the organisation.
- Intermediate Career: the field grade officer subcategory. This phase begins with the performance of duties defined in the officer's competency profile after a process of orientation that combines the needs of the AAFF and an assessment of that officer's competencies and personal ambitions. However, during this phase, officers can request a transfer to a different Competency Profile or even a different FA, based on acquired competencies³³, therefore constituting a linear career design.
- Senior Career: the flag officer subcategory. This phase is only accessible to officers in certain FA, with vertical progression within certain FA³⁴ being limited to the OF-5 grade. The career design currently in place is linear.

In this initial model, vertical progression in the FA that give access to the Senior Career is fast-tracked, as the goal is obtaining a more vigorous officer corps. On the other hand, currently these FA are the only ones for which promotion exclusion mechanisms have been defined. In contrast, more technical FA correspond to longer careers, and their age limits have been increased. Age limits should also be defined not only according to rank but also

³¹ In line with the major theories that link career choices to stages of personal development.

³² The conditions for access are summarised in Table 1.

³³ Such as obtaining an academic degree on their own initiative.

³⁴ Command and Operations FA and Joint Staff FA. The current number of positions assigned to flag officers remains the same, but those positions can only be performed by officers in these FA, who receive technical assistance from officers in the remaining FA.

according to FA. The model also surveyed the reactions to the definition of S common to several branches, which would serve to mitigate training and employment duplication.

Table1 – Description of Functional Areas

Functional area	Competency Profile	Activity Focus	S/eligibility criteria
Command and Operations	Naval Operations*	Command of ships **	Navy
	Amphibious Operations*	**	Marines
	Land/Air-Land Operations*	**	Infantry, Artillery, Cavalry, Military Engineering, and Signals
	Air Operations *	Aircraft piloting **	Pilots
General Staff	Joint and Combined Operations*	Planning operations at the operational and tactical levels (command of a force) and planning and directing joint operational training	All S
	Strategic Planning*	Planning, organising, and managing capability building projects, strategic military forecasts, force and resource planning	
Management and Support	Logistics Sustainment	Tactical level planning and logistics management	
	Human Resource Management	Planning and executing activities to attract and manage human resources	
	Management of Equipment and Infrastructures	Planning and executing activities to obtain, manage, and divest equipment and infrastructures	
	Information Operations	Planning, managing, and coordinating public relations and military civil cooperation activities	
	Security and Information	Information planning, research, and processing for military operations and national defence	
	Communications and Information Systems	Planning, management, and coordination of communication activities and information and cyber-defence systems	Signals or Electrical Engineers
Finance	Planning, organising, and managing military accounting and finance	Naval Administration, Military Administration, or Aeronautical Administration	

Functional area	Competency Profile	Activity Focus	S/eligibility criteria
Specialists	Engineering	Managing/coordinating technical maintenance activities and planning/preparing engineering projects	Military Engineering, Signals, Naval Engineers, Equipment, Aeronautical Engineers, Airfield Engineers, and Electrical Engineers
	Medicine	Organising and providing healthcare and related scientific research	Naval Doctors, Healthcare and Doctors
	Social Sciences ¹	Performing technical duties in specific areas	All S, as long as they hold an academic degree (level 6 or 7)
Teaching and Training	Teaching	Teaching and scientific research activities	
	Tactical and Technical Training	Planning, organising, and implementing training and instruction activities	All S

* Approval in the CEMC is required to remain in this Competency Profile

** Commanding Operational and Fixed units of their branch and coordinating a general staff at the operational and tactical levels (command of a force)

In terms of career management, the initial model is streamlined by appointing officers directly to specific positions/duties, always bearing in mind the performance of mandatory positions during the first two career phases, which are summarised in Tables 2 and 3, respectively. The appointment process is centralised³⁵ and requires the definition of a job description for each position and the assignment of a career manager to each officer, who maintains periodical contacts with that officer, harmonising the officer's ambitions, motivations, and competencies with the needs of the institution.

³⁵ In the human resources departments of each branch, rather than in the U/E/B commanders.

Table 2- Mandatory initial career positions

S or class	OF-1	OF-2
Navy	1 year of sea duty, 500 hours at sea	2 year of sea duty, 1000 hours at sea
Naval Engineers	1 year of sea duty, 500 hours at sea	2 years of sea duty, 1000 hours at sea, 2 years performing a technical function in the logistics area
Naval Administration	4 years of specific duties, of which 2 must be in the finance area	
Marines	2 years commanding a Platoon, 1 year as a member of a Company Level Unit (CLU), 1 year as an instructor	2 years as CLU Commander (Cdr), 1 year of General Staff (GS) duties in a Battalion Level Unit (BLU), 1 year in training area
Infantry, Artillery, Cavalry	2 years commanding a Platoon, 1 year as 2nd commander of a CLU, 1 year as an instructor	2 years as commander of a CLU, 1 year of CLU GS duties, 1 year in training area
Engineering and Signals	2 years as platoon Cmdr, 1 year as a CLU 2nd Cmdr	2 years as CLU Cmdr, 1 year in project area
Military Administration	1 year of duties in a support services CLU, 2 years in the finance area	1 year in the finance area, 1 year as commander of a service support CLU, 1 year of specific technical or GS duties in the logistics area
Equipment	2 years as a platoon Cmdr, 1 year as CLU 2ndCmdr	2 years as CLU commander, 1 year of technical GS or logistics duties
Aviator Pilots	2 years of pilot duties, 500 flight hours	3 years of pilot duties, 1 year of specific duties, 400 flight hours
Aeronautical Administration	1 year of specific duties, 2 years in the finance area	1 year in the finance area, 1 year of specific technical duties
Engineers	4 years in a project area, 2 years of technical GS duties	
Medicine	Exclusive performance of specific duties	

Table 3- Mandatory intermediate career positions

Competency Profile	OF-3	OF-4	OF-5
Naval Operations	3 years of sea duty, 1500 hours at sea, 2 years of command, 2 years of general staff duties as Force Commander (these duties are performed from OF-3 to OF-5)		
Amphibian Operations	Minimum of 1 year as first mate/2ndCmdr of a BLU, 1 year of GS duties	2 years as commander of a BLU, 2 years of GS duties in a Large Unit or as Force Commander	1 year of command of a U/E/B, 1 year of GS duties as Force Commander, 2 years of joint GS duties
Land Operations			
Air Operations	250 flight hours, 2 years of GS duties as Force Commander	2 years of GS duties as Force Commander, 2 years as group/squad commander, 300 flight hours	1 year as commander of a Base or equivalent Unit, 1 year General Staff duties as Force Commander, 2 years joint GS duties
Joint and Combined Operations and Strategic Planning	3 years of GS duties, of which 2 must be in a Large Unit or as Force Commander	3 years of GS duties, of which 1 must be in a Joint Command	3 years of GS duties, of which 2 must be in a Joint Command
Specialists	Specific duties in a U/E/B, Large Units, and Force Commands		
Management and Support			
Higher education	Specific teaching and research duties in an EESPUM		
Tactical/Technical Training	Specific training duties in Training Centres		

5.2. Description and discussion of results

5.2.1. Competencies

Seventy-five per cent of Type A officers and 2/3 of Type B officers (5/7 of the total sample) believe that the career design that gives access to the top of the military hierarchy should be mainly operational. Comprehensiveness of knowledge was also considered a competency required of a flag officer.

5.2.2. Career Design

Fifty per cent of Type A (Navy and Army) officers strongly prefer the current paradigm of importance of S importance and not of FA eventually established in the future. However, some S may include several professional areas, and their officers are not automatically qualified to perform duties in all of them. The remaining flag officers who were interviewed

agreed with a career classification not necessarily linked to a S, and that vertical progression should be restricted to some career designs. In their opinion, this will help with the task of finding the best fit for a given position, as well as with matching an officer's stage of personal growth to their career design in the transition from OF-2 to OF-3. They also believe that career reorientation offers more career opportunities outside the S. Officers of both types from the Army and the Air Force consider that the existence of common S, for example, in the engineering and medicine areas, would not be an advantage, given the specificities of each branch.

5.2.3. Differentiation systems

Fifty per cent of Type A officers from the Navy and the Army believed that the highest rank should be restricted to some S. However, the interviews with Type B officers revealed that the existence of career designs that are strongly linked to and restricted by S could go against the principle of equal opportunity. Furthermore, the definition of top ranks according to S implies that officers with merit can see their vertical progression capped. The PD and DHRA of the branches³⁶ believe that vertical progression to the flag officer subcategory should always be accessible to more technical S, albeit with restrictions on maximum rank.

5.2.4. Training

There is no general consensus as to how attendance of the JGSC should influence career progression. In fact, the course was not considered essential by the PD and DHRA of the three branches. For the Navy and Air Force officers, the main reason was the difficulty in appointing officers with strong potential to attend the course for a year, while Army officers were not convinced that the course is the best way to develop certain competencies. On the other hand, the type B officers from the Navy and the Air Force and one type A officer from the Army believe that completing the JGSC is extremely important because it broadens a field grade officer's vision and the scope of their knowledge.

5.2.5. Time in grade

The implementation of different times in grade according to FA/Competency Profile was not believed to be beneficial or easy to achieve by 75% of Type A officers and by the type B officer from the Air Force. The main reason is the possible infringement of the principle of equal opportunity, although it should be recalled that there is currently a limit set on vertical progression based on S.

5.2.6. Horizontal progression

This statutory mechanism was considered beneficial by most Army flag officers and Air Force type A officers because it encourages the performance of specialised positions on a voluntary basis without hindering the vertical progression of other officers. However,

³⁶ And the type B flag officer from the Air Force.

the other flag officers believe that horizontal progression may actually be contrary to the ethos of an officer, and that career development should be based on vertical rather than horizontal principles.

5.2.7. Regulatory mechanisms

The Army recognised that there are no truly organisational/institutional/formal career management mechanisms. But in the Navy and the Air Force, it was deemed crucial that the appointment of officers to positions be done centrally at the Personnel Directorate and not by the U/E/B Commanders.

In the Navy and the Air Force, qualitative performance evaluation systems were favoured over quantitative ones because they help mitigate some inconsistencies/subjectivities in score averages.

In general, the up-or-out mechanisms in force are seen as potentially leading to experienced and highly qualified officers exiting active duty, although they may enhance meritocracy over seniority. Thus, it was expected that the interviewees would prefer an Up-and-Stay system.

5.3. Validation of the initial model

The reactions of the flag officers interviewed were varied; however, some trends were detected, especially when compared to the systems of the western countries under analysis.

One of these trends concerns the creation of a career design based on FA, and their division into the competency profiles described in Table 1. The reason for this is that it reinforces the principle of equal opportunity by allowing officers from S whose careers are currently statutorily capped at OF-7, increasing their opportunities for vertical progression. But according to the same logic, the minimum times in grade and age limits must be the same for all FA.

Despite the lack of consensus, the present study shows that completing the JGSC should become more important, eventually becoming a way to identify the officers with the greatest potential, not only because of its comprehensive syllabus and encompassing purpose, but also because in western countries the JGSC is generally considered essential for all branches. Furthermore, not attending the JGSC implies that operational and strategic planning positions would require on job training. It should also be noted that the number of officers that would be appointed to the JGSC would be much smaller than for the Field Grade Officers Course.

The interviews also revealed that in the case of Portugal, it would be prudent and convenient, as a rare exception, to allow for the promotion of officers from the Management and Support and Specialists FA to flag officers, if there are no other officers with the competencies required for the performance of certain duties. Given the results obtained,

the S common to all the branches must also be removed from the initial model due to the specificities of each branch of the Portuguese AAFB.

Conclusions

This research aimed to assess the defining elements of the career structure of AAFB officers in western countries that can be used to improve the Portuguese model. This GO was supported by the search for an answer to a RQ: How can the defining elements of the officer career structure in other western countries improve the Portuguese model?

To answer this RQ, a qualitative research strategy was delineated, combining a comparative research design and an essentially inductive method. The method initially used relied on the interpretation of data obtained using a traditional method of documentary research, supplemented by non-participant observation through semistructured interviews with Defence Attachés, to characterise the career structures of the western countries under analysis. After the characteristic elements of foreign career structures had been ascertained, an initial model for the career structure of Portuguese CP officers was created. The model was validated through semi-structured interviews with a varied sample of flag officers in an attempt to obtain a cross-section of the universe.

In order to answer SQ1, the defining elements of the officer career structure in the Portuguese AAFB were compared to those of the western countries analysed. In Belgium, the Netherlands, the US, Germany, and France, career progression is based on parallel career designs, several types of careers are defined, and in some cases officers can transfer between them at different points in their career. On the contrary, in the southern European countries analysed, linear career designs based mainly on S, which are linked to the initial training attended, are the rule, capping the vertical progression of officers from some S. Enrolment in the General Staff Course or any equivalent training/education activities is generally a requirement for promotion to flag officer in all branches of the Armed Forces of the majority of the sample, with the exception of Portugal.

To answer SQ2, the regulatory career progression mechanisms were compared for the various models analysed. While in the US and the Netherlands pure Up-or-Out systems are in place, the remaining countries use Up-and-Stay or Mixed models. In addition, with the exception of Portugal, Spain, and Italy, qualitative merit evaluation methods are the norm in western countries, accompanied by effective counselling/coaching systems, allowing officers to plan their own career designs in a protean approach.

To understand how the characteristic elements of the career models of other western countries could be adapted for the Portuguese Armed Forces, the reactions to a career model based on the implementation of a parallel career design based on FA instead of S were ascertained. The opinions of the flag officers interviewed were varied. Therefore, although the existence of S was found to be important, especially for type A flag officers, the possibility of different career types that fall outside S, in the form of FA, was not

viewed negatively. However, a predominantly operational career structure with command experience continues to be considered the most suited for the highest rank of the AAFF hierarchy. The answer to SQ3, therefore, is the recognition that adapting the defining elements of the military career structures of other western countries to the Portuguese reality implies a profound paradigm change and thus should not be rushed.

This study contributed to expand the knowledge about the career structures in force in western countries, which were subdivided into differentiation systems and career design systems, and to identify and compare their defining elements, filling some of the gaps found in previous research. Furthermore, it was possible to identify, not the structural elements inspired by external military career models that can be adapted to the statutory precepts of the Portuguese AAFF, but rather some aspects that other western countries consider essential for their officers' harmonious/effective career/personal development.

Recommendations and future research

In view of the research carried out, the career structure of AAFF CP officers can be improved through a considerable paradigm shift, for example, by replacing the dominance of S with the centralisation of the competencies acquired and demonstrated by military officers. This will require the creation of parallel career designs, combined with the appointment of officers in the OF-3 grade to a specific competency profile integrated in one of the five FA described in Table 1.

In addition to the need to change mentalities, implementing the proposed career structure must be accompanied by a thorough review of the existing career management mechanisms to bring them closer to a protean model. This can be achieved by appointing officers to a position³⁷ instead of a U/E/B, by giving preference to application processes, by defining the staff numbers for each Competency Profile, and by implementing mentoring/coaching mechanisms. The definition of descriptions for all CP positions/duties is a matter of urgency, given the need to benchmark competencies and enhance performance evaluation.

It is also considered that, in view of the importance of human capital in Portugal, exclusion from promotion should result in the failure to transition to the next rank, rather than to automatic transition to reserve status, since this can lead to the loss of officers with effective merit. This implies a change from a Mixed to an Up-and-Stay system, which will result in horizontal progression becoming less relevant, therefore it should be eliminated.

The career design proposed, which serves as a basis for the above recommendations, and which has been discussed in subchapter 5.3, is summarised in the graphic in Figure 10.

³⁷ Always accounting for the performance of mandatory positions in the initial and intermediate phases of the career, as shown in Tables 2 and 3.

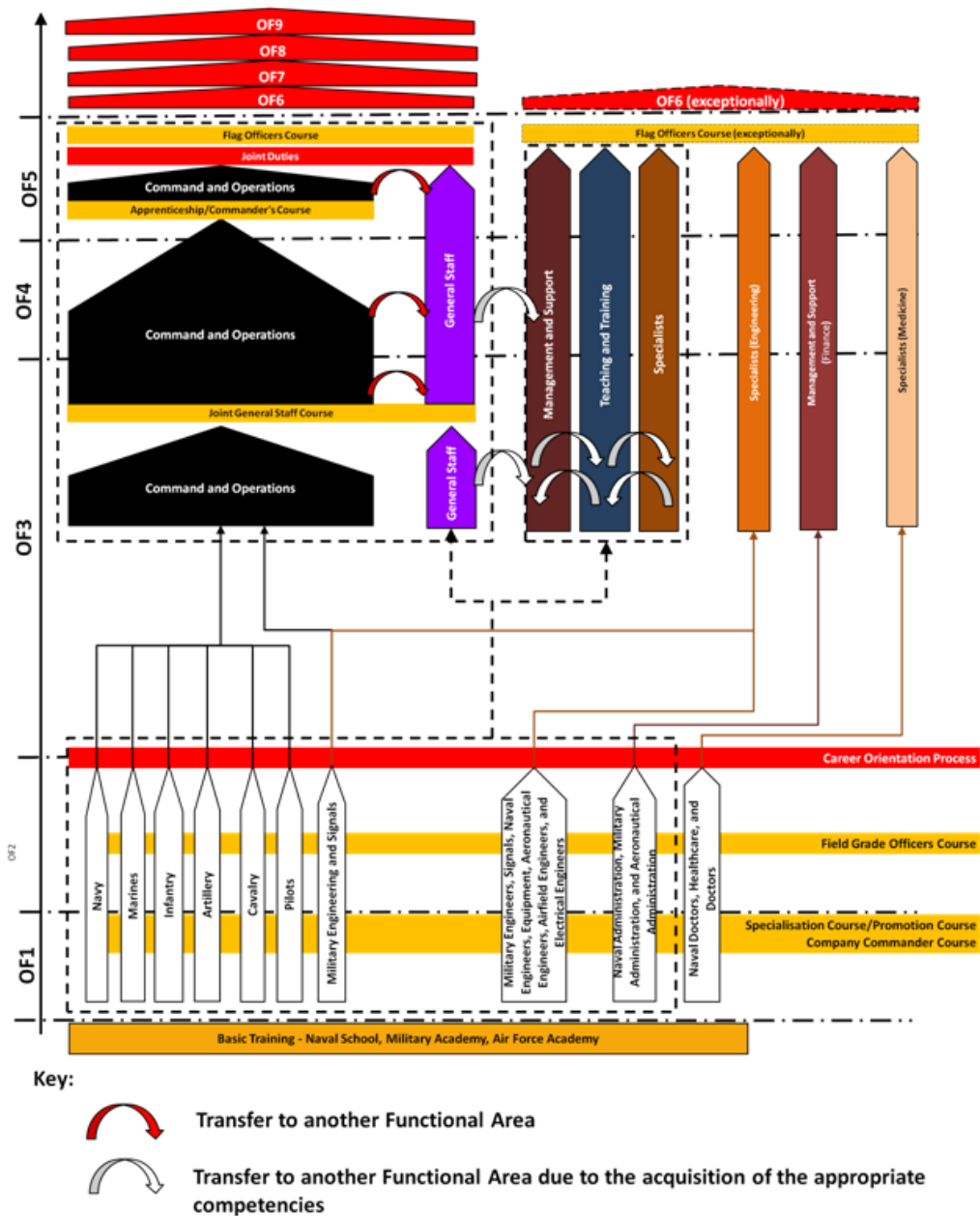


Figure 10 – Proposal for a Career design

This research focused only on CP officers, who did not necessarily hold a higher education degree but who can legally be promoted to flag officer, thus only some S were analysed. Furthermore, due to time constraints, it was not possible to expand the sample of flag officers to validate the initial model. Therefore, to increase representativeness,

future research should include the S that were not analysed in this study³⁸, and the validation sample expanded to include not only flag officers, but also officers from all S. It is also important to develop similar studies for the sergeants and other ranks categories, and to analyse the possibility of lateral entry in situations that require a high degree of technical specificity.

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