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HIGHER EDUCATION IN PORTUGAL BETWEEN 1995-2015 AND POSSIBLE FUTURES

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Abstract

One of the most visible and striking changes in contemporary Portugal is certainly what has been happening in education, namely in higher education. In this communication, based on the official data, the authors analyze the course of higher education in Portugal, regarding the expansion and diversification of the supply and demand of higher education as well as the public and the private financing of this level of education. From the analysis of official data, the authors show that for decades there was an explosive demand for this level of education accompanied by a public offer and adjusted private offer, with a slowdown and decrease in demand from 2008 due mainly to the economic and financial crisis of the country between 2008 and 2015.

The authors show that this fall in the demand for higher education happens at the same time that the public investment in this level of education decreases and that the living conditions of the students worsen, denouncing a process of elitization of higher education in Portugal. To know the living conditions of the students, the authors had questioned about the social and economic origin of the student population as well as the costs that students are forced to carry out to study - costs associated to the enrollment and attendance of higher education and living costs - by applying a questionnaire to a representative sample of public and private Portuguese higher education students which has been applied already for 4 times: 1994/95, 2005/06, 2010/11, 2015/16.

The homologous data collected in the four editions of the questionnaire application are compared, aiming a better understanding of the dimension of the process of democratization of higher education in the country. From the analysis of the data coming from the 4 studies, it was concluded that higher education in Portugal, instead of democratizing and universalizing, seems to become increasingly a teaching for the elites. The authors finish the analysis by presenting some educational policy measures that appear to be indispensable for building a more just and equitable higher education in the country.

Keywords: Higher Education, Socioeconomic Origin of Higher Education Students, Democratization, Elites.

1 INTRODUCTION

In the last decades, Portugal has undergone numerous changes of a political nature towards the democratization of the country. After 48 years of dictatorship, since the Revolution of April 1974, Portugal has been democratizing itself. This process was translated, among other realities, into the mass consumption of public goods and services and the implementation of a welfare state. This was the case, for example, with education.

Since 1974, significant changes have taken place in the educational framework, namely the establishment of compulsory schooling (progressively 6, 9 and 12 years); the diversification of the offer of higher education, with the opening of this level of education to the private initiative and the creation of new establishments of higher education, public and private; the expansion of the social base of student's recruitment and the increase in the rate of enrollment in higher education.

There was thus a demand for education in such an intense way that one can speak of an "explosion of education". In fact, the perception of the role of education in economic development as it is witnessed by studies of human capital [1-3] and as a process of social ascension [4-5], transformed the country.

If at the end of the 1970s Portugal had an illiteracy rate around 50%, today it has a value that does not reach 5% and which basically covers the elderly population [6].

However, an analysis of the public policies for financing higher education and the social composition of higher education students leads us to question the hypothesis that higher education has become truly democratized.

2 ABOUT EDUCATIONAL ATTENDANCE LEVELS

One of the most significant realities regarding the demand for education in Portugal in the last decades is the explosive increase in demand, that the evolution of the real school enrolment rate witness. Observe the values in Table 1 [6].

Table 1. Real school enrolment rate by level of education (% of students enrolled in a given level of education compared to the population of normal age at that level)

LEVEL OF EDUCATION	1961	1970	1980	1990	2000	2010	2015	2016
Preschool	0.9	2.4	14.2	41.7	71.6	83.9	88.5	88.4
Basic education	80.4	84.3	98.4	100.0	100.0	100.0	98.3	97.7
Secondary education	1.3	3.8	11.7	28.2	58.8	72.5	74.6	75.3
Higher education	na.	na.	10.7	20.2	24.0	31.3	31.4	33.1

The values in Table 1 clearly show the strong increase in real school enrollment rates in the country, although it should be noted:

- some irregularity in the evolution of these rates in recent years, which will not be strange the economic crisis that the country has known since 2008 and the austerity measures that accompanied it;
- the fact that the frequency of secondary education has not yet reached 100%;
- the fact that the actual rate of enrollment in higher education is still far from the European 2020 target: that at least 40% of the population of the age of higher education is actually attending it.

From the analysis of the values of the table, one can see that the country still has a significant way to go in order to fulfill the objectives of compulsory schooling and, in the framework of higher education, to fulfill the objectives of Europe 2020, despite the expansion that this sector has known in recent decades. However, the growth of higher education in Portugal in the last decades is undeniable. See Table 2 [6].

Table 2. Students enrolled in Higher Education: total and subsystem between 1990 and 2017

YEARS	TOTAL	PUBLIC HE			PRIVATE HE		
		Total	University	Polytechnic	Total	University	Polytechnic
1990	157869	119733	95746	23987	38136	32756	5380
1995	290348	186286	132199	54087	104062	84895	19167
2000	373745	255008	164722	90286	118737	88190	30507
2005	380937	282373	173897	108376	98664	67157	31507
2010	383627	293828	183806	110022	89799	60174	29625
2015	349658	292359	191707	100652	57299	42666	14633
2016	356399	297884	191633	106251	58515	42981	15534
2017	361943	302596	192201	110395	59347	43013	16334
Δ17/90(%)	129%	153%	101%	360%	56%	31%	204%
Δ17/10(%)	-6%	3%	5%	0%	-34%	-29%	-45%

It should be noted that, following the financial crisis of 2008, the number of students declined by 6%, particularly in Private HE (-34%); Public HE stabilized to grow again slowly from year 2015, probably

as a consequence of the change from an ultraliberal government to a center-left government that put an end to some of the previously established austerity measures.

This process of democratization and the explosion of demand for higher education has had direct repercussions on the number of graduates, which has also increased at a high rate. See Table 3 [6].

Table 3. Evolution of the number of graduates in higher education

YEARS	Nº	YEARS	Nº
1991	18671	2010	78609
1995	35939	2014	75906
2000	54255	2015	76892
2005	69987	2016	73086

The importance of higher education and the role that young people attach to education as an instrument of social advancement [4, 5, 7, 8] and an increase in skills and abilities that contribute to the growth of the economy and the country [3] is also the evolution of the number of PhDs held in the country as well as by Portuguese youths abroad in recent decades. See Table 4 [6].

Table 4. Evolution of the number of PhDs held

YEARS	IN PORTUGAL	ABROAD	TOTAL
1970	23	37	60
1980	44	72	116
1990	250	87	337
2000	694	165	859
2005	1058	141	1199
2010	1500	232	1732
2014	2503	247	2750
2015	2351	618	2969

According to the values in Table 4 in less than 50 years, starting from a highly selective and elitist educational system, the number of doctorates increased more than 100 times. Already in the middle of the democratic period, in just over two decades, the number of doctorates increased almost 10 times.

3 FINANCING EDUCATION

One of the most significant facts regarding education in general and public higher education in particular is the sharp decline in public investment in education. Observe the values in Table 5 [9].

Table 5. Public expenditure on education and higher education, as a percentage of GDP

YEARS	PORTUGAL	
	All Education	HE
1999	5,03	0,94
2005	5,06	0,92
2010	5,40	1,09
2011	5,13	1,01
2013	5,29	0,89
2014	5,13	0,91

This progressive lack of State responsibility in education, particularly in higher education, is particularly disturbing because it does not follow what is happening in the partner countries of Portugal in the European Union or in the OECD. Observe the values in Table 6 [10].

Table 6. Evolution of public funding of higher education in the OECD, EU (28) and Portugal

YEARS	1995	2005	2008	2011	2013	2014
OECD average	77	70	70	70	71	70
UE28 average	86	80	80	80	80	78
Portugal	96	68	62	69	58	62

While it is true that the current trend in the world is the progressive reduction of the participation of the states in the financing of higher education, it is undeniable that in Portugal this decrease occurred abruptly and aggressively, obliging public institutions of higher education to seek external sources of financing, notably through patronage, service provision, contracts with companies and, fundamentally, through the collection of fees for students whose amounts reach between 15% and 20% of the budget of these institutions.

Of course, the public funding framework for higher education has to change, notably through new financing contracts from public higher education institutions that allow these institutions to fulfill their mission without external constraints and so that tuition fees are abolished or will substantially reduce its amount so that demand is intensified and the country is endowed with the highly skilled workforce it needs to develop.

4 SOCIO-ECONOMIC CONDITIONS OF STUDENTS OF HIGHER EDUCATION

4.1 Social composition of students in higher education

One of the factors that hamper the frequency of higher education around the world is certainly the financial factor. Portugal will be no exception.

In order to understand the socio-economic conditions of higher education students, the authors conducted a study on students of higher education, the CESTES - Economic and Social Conditions of Higher Education Students, which was carried out in the application of a questionnaire to a significant sample national HE students, both public and private, university and polytechnic and that already goes in the 4th edition. With this study it is possible to perceive the way in which the socioeconomic composition of the students of higher education has developed in the period 1995-2015.

See Table 7, which represents the students' perception about the income of their household [11].

Table 7. Socioeconomic status of families of students in higher education, according to students' perception of household income in 1995, 2005, 2011 and 2016, as a percentage of the total of the students

HOUSEHOLD INCOME	1995	2005	2010	2015
High / medium high (>1500€/month)	14.4	17.3	38.2	36.7
Medium (870-1500€/month)	71.8	74.1	43.8	46.7
Low (< 870€/month)	13.8	8.6	18.0	16.6

The comparison of the level of income perceived by students of higher education in the four dates shows that higher education in Portugal, although, as has been shown previously, having grown in number has not truly democratized. In fact, the percentage of students perceived as belonging to the "lower class" has grown little in the 20 years under analysis while the opposite is true for students who consider "high / medium high" the level of income household, even if this growth has been made at the expense of the "middle classes" slimming.

Thus, as the increase in the demand for higher education in the country is undeniable, it can't be said that there was an effective democratization of the frequency of this level of education. Obviously, in order to ensure this democratization, young people from all strata need to be called to HE. Social

support measures will be necessary to enable the most disadvantaged young people to have equal access to this level of education.

4.2 The evolution of affordability (financial accessibility) of students in Portuguese higher education

Taking measures that effectively contribute to a higher demand for higher education requires not only the knowledge of the socio-economic background of students attending this level of education but also the ability of families to have a child to study in higher education. For this, an important indicator can be used - the affordability -, that is, the degree of financial accessibility of the students of the higher education that indicates the effort that the families realize so that one of its members attends the higher education.

Table 8 shows exactly how the effort that Portuguese families have made to have a child in higher education in the last decades has evolved. To do this, and following Johnstone [12] and Cabrito [8], the values of education costs (administrative costs and teaching materials) and living expenses (costs of food, clothing, housing, transportation, health and leisure) were used to understand the effort students and families do comparing net education costs with the values of GDP *per capita* in 2005, 2010 and 2015 [13].

Table 8. Education costs, students' living costs and total costs of students of higher education as% of GDP per capita (2005, 2010 and 2015)

	2005		2010		2015	
	Value €	% GDP Per Capita	Value €	% GDP Per Capita	Value €	% GDP Per Capita
(1) GDP per capita (annual, at current prices)	16 891,00		17 017,70		17 329,90	
(2) Education Costs	1 841,20	10,9	1 934,83	11,4	1 718,10	9,9
(3) Cost of Living	2 880,00	17,1	4 689,62	27,6	4 727,40	27,3
(4)=(2)+(3)= Total Costs	4 721,20	28,0	6 624,45	38,9	6 445,50	37,2
(5) Support in Scholarships per Student	266,00		341,40		345,58	
(6)=(4)-(5)= Net Cost	4 455,20	26,4	6 283,05	36,9	6 099,92	35,2
(7) Education Tax Deductions	600,00		670,00		800,00	
(8)=(6)-(7)= Net Cost after Tax Deductions	3 855,20	22,8	5 613,05	33,0	5 299,92	30,6
(9) Loan per Student (*)						
(10)=(4)-(5)-(9) Total Costs (out of pocket)	4 455,20	26,4	6 283,05	36,9	6 099,92	35,2
(11)=(10)-(7) Total Costs after Tax Deductions	3 855,20	22,8	5 613,05	33,0	5 299,92	30,6

The analysis of the figures in the table shows how difficult it is for a family to guarantee the presence of a child in higher education, which is more difficult in 2015 than in 2005. However, the evolution of this indicator seems to be moving in a positive direction, that at present this indicator is more favorable for students following the measures of social support and job creation that the government in charge has been implementing since 2015. However, it should be stressed that the effort required of a family is still too high so that it is possible to guarantee the massification of this level of education.

5 FINAL CONSIDERATIONS

The above shows clearly how higher education has evolved in Portugal, regarding the demand for this level of education and its financing. Thus, it seems to be possible to conclude that the massification of this level of education requires effective educational policy measures, namely greater participation of the State in the financing of higher education, increased social support for low strata students, abolition of attendance rates in public higher education and social and fiscal support to families.

New policies of state social accountability for higher education and support for students and their families will promote the demand for higher education and contribute to this level of education becoming mass higher education [14], the accomplishment of the objectives of Europe 2020 and the country is endowed with the highly qualified workforce needed for its development.

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