
SUMMARY:

COMPETITIVENESS AND IMPACT ON EQUITABLE ACCESS AND SUCCESS IN QUALITY HIGHER EDUCATION José Ferreira Gomes, University of Porto (Portugal)

A key line of the IAU policy statement declares that *Equitable access and academic excellence are essential and compatible aspects of a quality higher education* and this implies the implementation of *Targeted strategies and policies designed specifically to elicit the students' full potential [...] so as to increase access to, and success in higher education.*

These issues will be discussed from the point of view of the Portuguese higher education. Portugal has a binary system (university and polytechnics) where the public (government) system represents about 80% of the student body. A *numerus clausus* quota system is applied to the entire public system and this plays an important role in the geographical and subject orientation of students. The situation is well accepted by society save for the shortage of places in medicine relative to the very high demand. Equity is not a problem in the published opinion but some empirical evidence may be interpreted differently.

This paper will discuss some issues of the current situation and the more obvious causes ranging from the relatively low financial support to students to the quality of secondary education.

COMPETITIVENESS AND IMPACT ON EQUITABLE ACCESS AND SUCCESS IN QUALITY HIGHER EDUCATION

José Ferreira Gomes, University of Porto (Portugal)

1. History and present situation of Portuguese Higher Education.

The first Portuguese university was created in 1290 following the medieval European trend. Universities in the Portuguese colonies were a very late creation as the political strategy depended more on the control of the trade routes than on the land occupation. Even the exile of the Portuguese royal court to Brazil in 1807 did not lead to the creation of a full fledged university but only Schools of Medicine (Bahia and Rio in 1808) and Engineering (Rio, 1810). By contrast, Spain created universities in the Americas very early in the 16th century (Santo Domingo, 1518-1538) while home universities were already producing huge numbers of layers to built the backbone of the colonial administration. The big steps in the expansion of Portuguese higher education followed the political transformation, the abolition of the monasteries in 1834 with the complete reorganization of education and the arrival of the Republic in 1910 with the defeat of the old monarchic stronghold of the University of Coimbra. More recently, massification occurred relatively late to achieve a level of participation close to the European average (Fig.1).

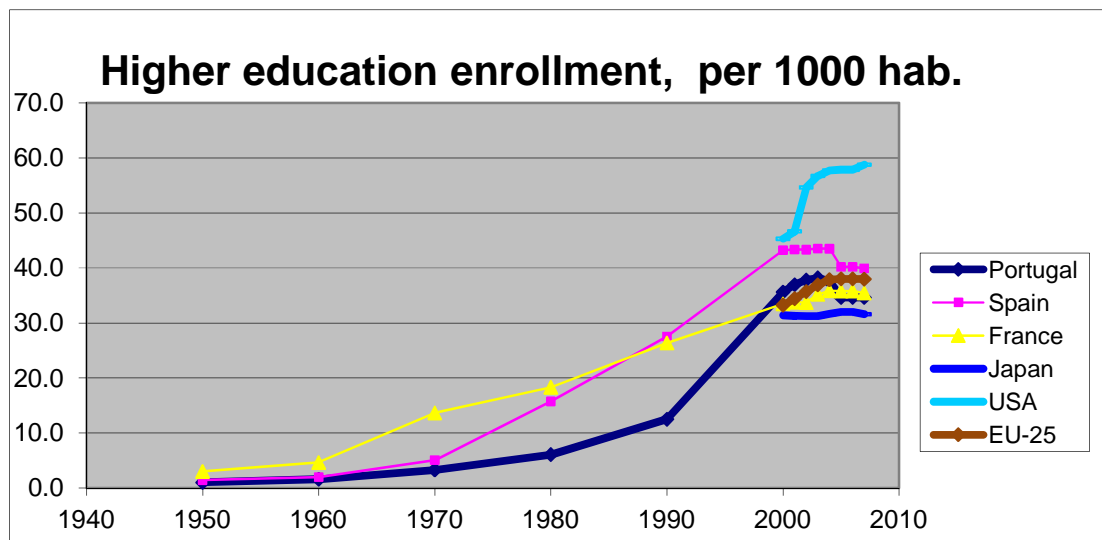


Fig 1. Higher Education enrollment per 1000 hab. in selected countries.

It is interesting to note that the participation in Germany is relatively lower and this is a consequence of the traditionally very strong professional training that is considered outside higher education remit in countries of Germanic influence or culture.

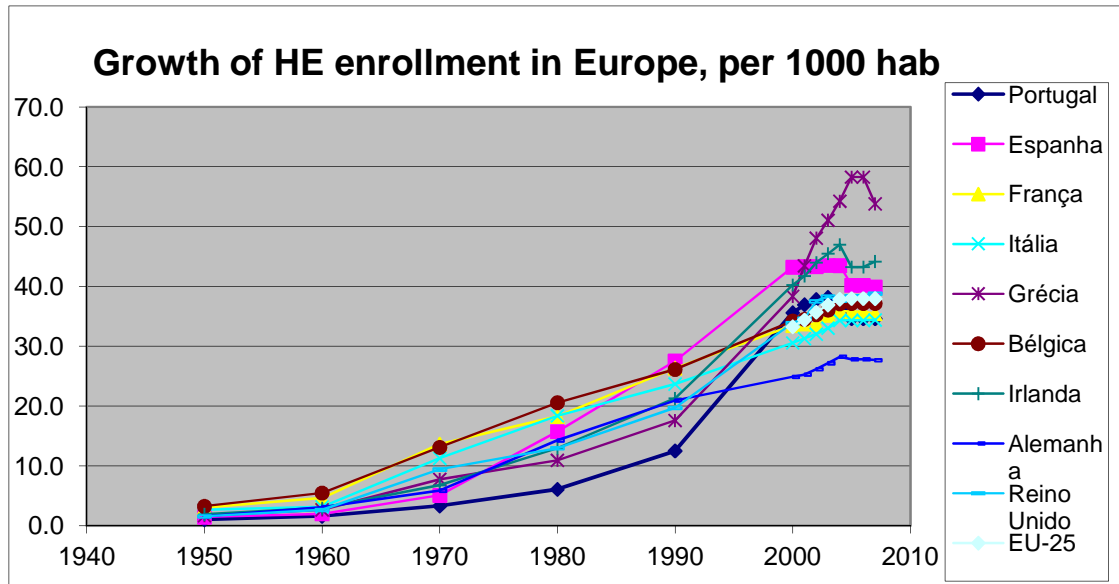


Fig 2. Higher Education enrollment per 1000 hab. in selected European countries.

The Portuguese participation leveled off before the economic crises we are going through at present, while the unemployment of graduates was already becoming an issue.

How this growth in participation translates in equity may be appreciated by the Spanish situation where statistics by Autonomous Region allows a further insight¹. The participation appears to depend on the labour market situation and on the perception of the short term rewards from a higher education degree. The result is that participation tends to be higher for women and in regions or times of higher unemployment.

In Portugal, student access to public higher education depends on the marks of secondary education with special exams in certain topics. The system is well accepted but implies a strong social bias. The Polytechnic degrees are supposed to be more vocational in character and are less well established as they were slowly introduced in the 1980's and 1990's. The end result is that Portuguese higher education is far from offering equal opportunities².

¹EQUITY IN EDUCATION. THEMATIC REVIEW. SPAIN. COUNTRY NOTE. Richard Teese (Rapporteur), Petter Aasen, Simon Field, Beatriz Pont, Review visit: May - June 2005; This version: March 2006

² In: Alberto Amaral et al, "Students' preferences and needs in Portuguese higher education", 28th Annual EAIR Forum, 30Aug-1Set.2006, Rome, Italy.

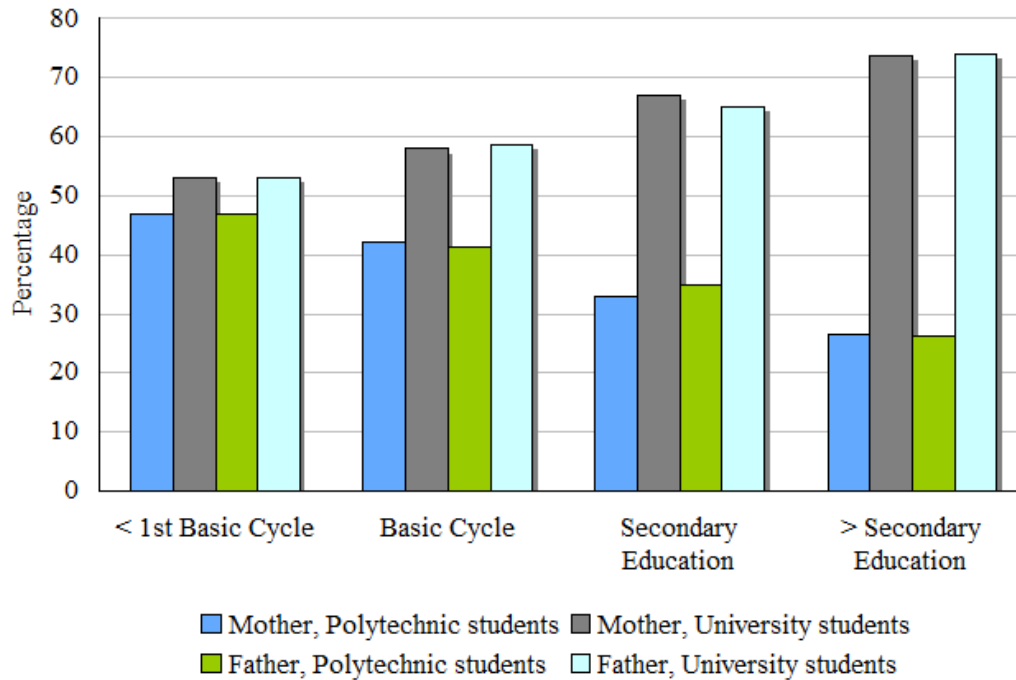


Fig 3. Comparing (%) the level of schooling of parents of students in universities and polytechnics.

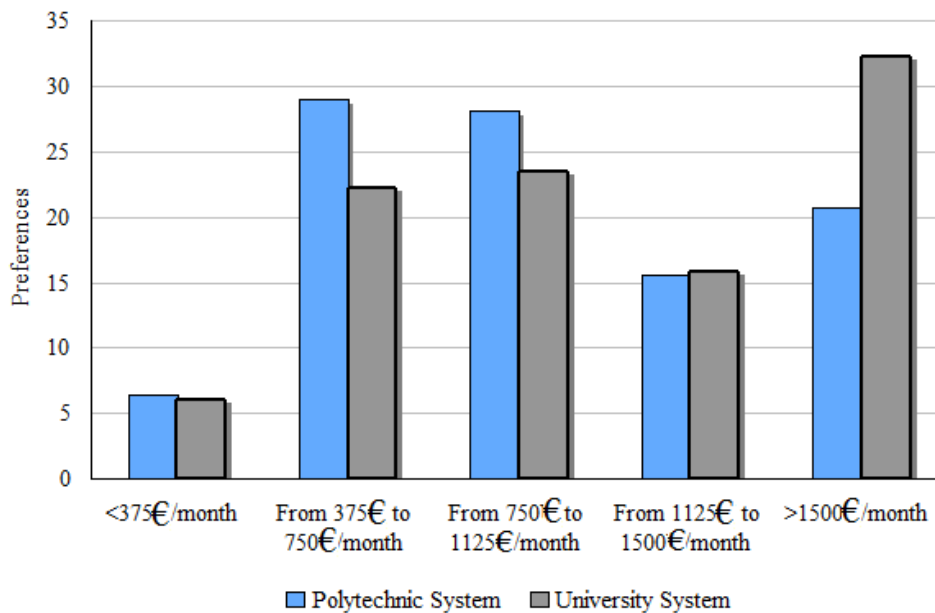


Fig 4. Family income and choice of higher education sub-system.

The selection by gender is more difficult to analyse as the end result is compounded by cultural reasons together with the strict selection of the final marks at the secondary education.

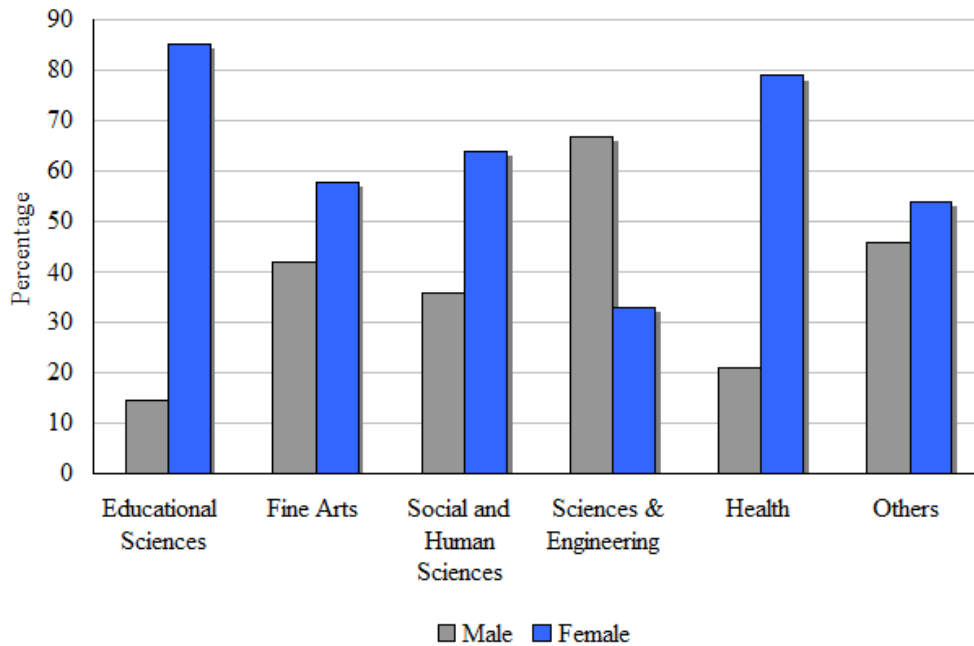


Fig 5. First year enrolments by gender and disciplinary area³

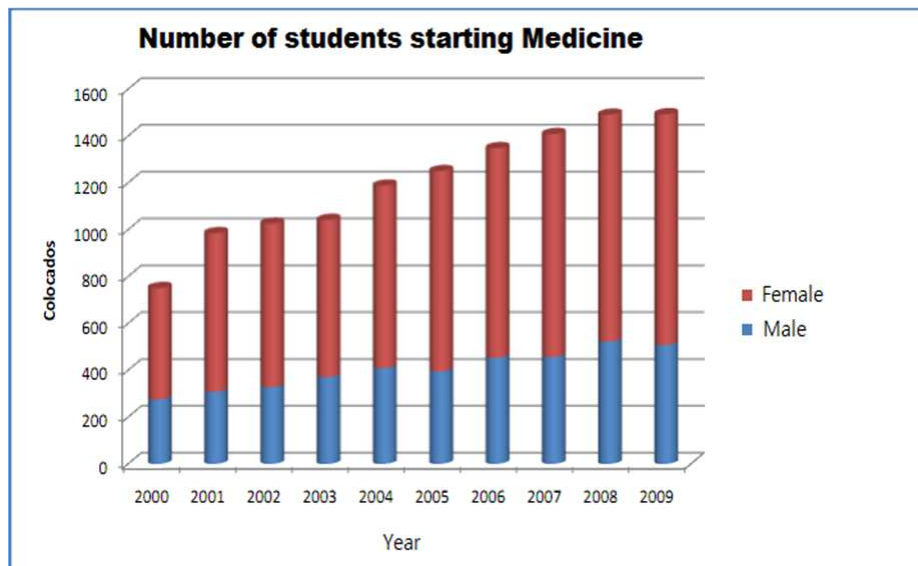


Fig 6. Students starting Medicine (DGES, Lisbon)

³ <http://www.dges.mctes.pt/NR/rdonlyres/4FB23C32-9A3C-4B7A-B9A5-F90DDA22FB59/4201/Medicina.pdf>, in September 11, 2011.

The intake of female students is higher (56% in 2010) than that of males but the difference in Medicine is much higher.

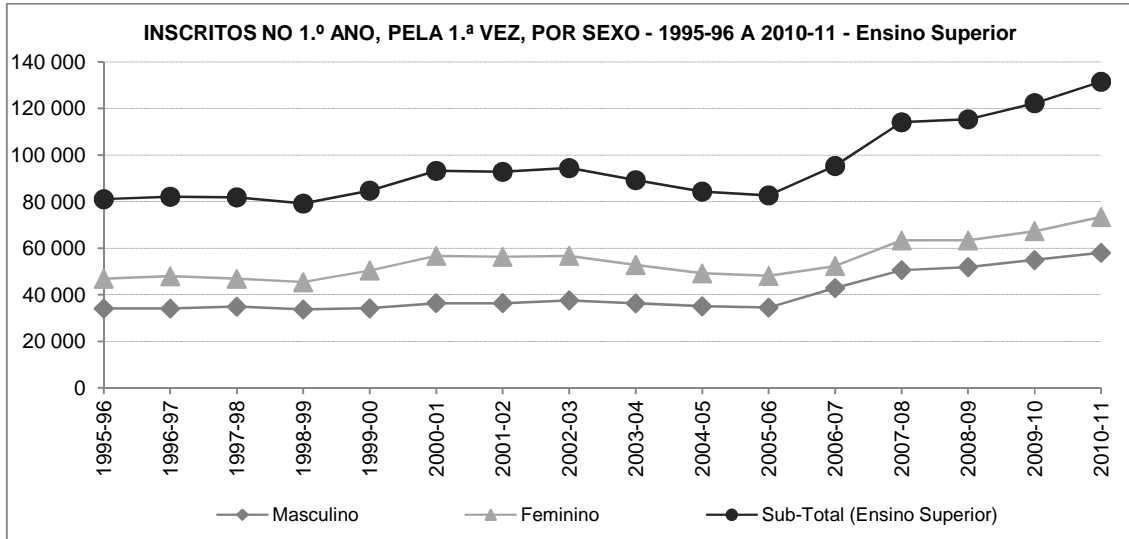


Fig 7. Students enrolled in higher education for the first time⁴

⁴ <http://www.gpeari.mctes.pt/?idc=172&idt=179>, in September 11, 2011.

2. Factors hindering equity in access

a. Fees.

Different countries take widely different policies in what concerns student fees as seen in the following Chart.

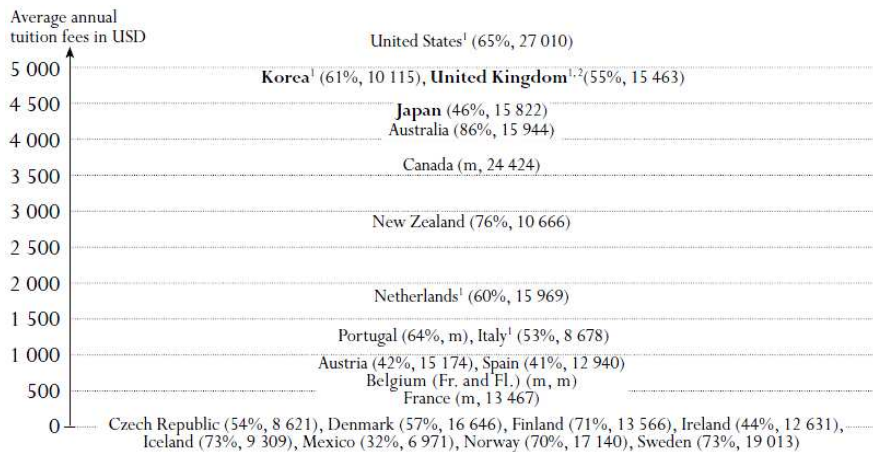


Chart 1. Average annual tuition fees charged by tertiary- type A public institutions for full time students (2006-7). Tuition fees in USD PPPs. (Net entry rate and net expenditure per student, in USD.)⁵

Countries with high fees tend to have an extensive system of support with more students receiving some sort of support.

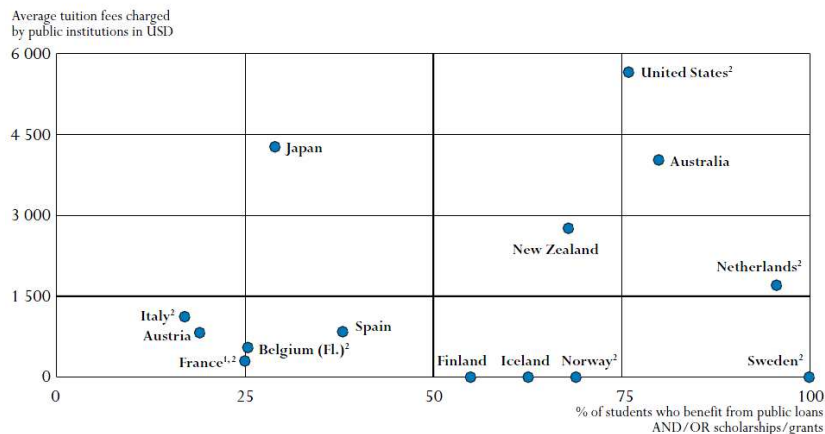


Chart 2. Relationships between average tuition fees charged by public institutions and proportion of students who benefit from public loans AND/OR scholarships/grants in tertiary-type A education (academic year 2006-07)⁶

⁵ OECD, Education at a Glance 2010, Chart B5.1.

In the Portuguese case, fees in public institutions are relatively low and lower income students may get a grant to offset this cost. The living costs for displaced students are more relevant as public support is insufficient to take this factor out of the decision students and their families have to take.

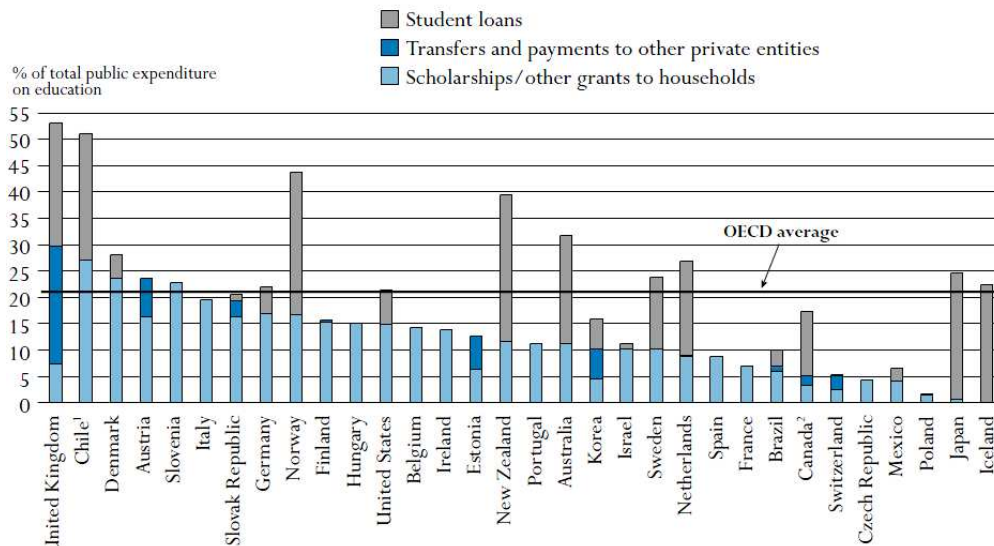


Chart 3. Public subsidies for tertiary education⁷

The situation with students in private institutions is different not always fully present in official statistics. About 20% of the student body is in private institutions paying fees that are typically five times those of the public institutions. Government grants cover part of this for a few students.

b. Lodging and living costs

More than half of the students are away from home and lodging and living costs are particularly relevant. Institutional residences offer a favorable solution but this is largely insufficient and most students have to find private lodging, mostly as rented out rooms in private homes. For some students from the larger towns of Lisbon and Porto that are not offered a place in one of the local institutions, the cost of living in a different town may be comparable to that of paying fees in a local private institution and this has been a relevant source of recruitment for these institutions. Government support takes the form of student grants and subsidized meals but this leaves out relevant costs for many students.

⁶ Education at a Glance, 2010, Chart B5.3.

⁷ OECD, Education at a Glance 2010, Chart B5.2.



c. High school

Education is organized in two cycles, Basic from 6 to 15 years of age and Secondary for a further 3 years. In Basic Education, 85% of the pupils are in public schools (or under public control) while in Secondary Education this figure is reduced to 75%. In part, this is the result of the perception by many families that private schools will imply an advantage and this becomes more acute as the selective exams to enter Higher Education approach. Of course the choice is available only to families with higher incomes living in large urban areas, especially around Lisbon and Porto. For other families the choice is limited to public schools and the choice between the public schools in the residence or workplace areas is also considered.

d. Overall view

There are no good and extensive studies of the situation in what concerns access. It is clear that financial stress is a factor in the decision of a number of students but enrollment of high school graduates is very high what suggests that its overall effect is limited. More important is the quality of schooling and this is becoming more of a political problem. In the not very distant past, government schools were seen by families as the best option in terms of quality of teaching and almost all students intending to access higher education would go through them, especially in senior high school. In the last decades, the pressure to increase the participation of youngsters in school increased and this is creating new difficulties and the quality of the teaching is generally perceived as being lowered. The perception of most middle class families is that a private school is the only option for a good education from the very young age up to senior high school. The number of students taking this option is slowly increasing and this is creating new inequalities in the access. It is generally assumed that entrance to the most competitive degree programs like medicine and architecture requires either a good private school or extra (paid) support if the student is in a public school or both.

3. Success in higher education

The success rate in Portuguese higher education (measured by the ratio of the number of graduates in year t to the number of entrants in year $t-n$, where n is the normal duration of the degree program) is around 66% a value very close to that estimated in the US in a more rigorous way by longitudinal studies. Within Europe, wide variations exist and the social conditions of students vary widely. In general the success rate is lower in the southern countries but some northern countries found it necessary to design their student support policies in ways that do not favour the lengthening of the higher education experience. Historically, this is a very low value as it has decreased very markedly in the last many decades. There is still a large political pressure to improve further the statistical success, a pressure that



is sometimes explicitly put to teaching staff. There is some evidence⁸ that success is higher among female than among male students but a social or educational correlation appears to be very weak. Structured programs to improve success and to support students in difficulty are rare.

⁸ OS ESTUDANTES E OS SEUS TRAJECTOS NO ENSINO SUPERIOR: Sucesso e Insucesso, Factores e Processos, Promoção de Boas Práticas, RELATÓRIO FINAL, António Firmino da Costa, João Teixeira Lopes http://etes.cies.iscte.pt/Ficheiros/relatorio_ETES_completo.pdf, in September 13th, 2011.