

Appendix

Contents

APPENDIX	1
1. The contents of the reports.....	2
2. Meetings and documents for Partners	10
3. The four national reports	24
a) Portugal	25
b) Spain.....	94
c) Italy.....	134
d) Greece	152
4. Grids for analysis.....	219
5. Interview guide	226
6. Interviews to experts	227
7. Final analytical grid and indicators	267
8. Outputs.....	271
e) Articles.....	272
f) Conference papers and presentations	293
g) Articles in progress for future submission.....	372
9. Project documents	412

1. The contents of the reports

Report Structure (maximum 40 pages)

Introduction

Section A: Background

A.1. National Context description

A.2. Education System Characterization

A3. Processes and Mechanisms of Monitoring and Evaluating the Educational System

Section B: Crisis Impacts in Education

B.1. Equity: Policies and Achievements

B.2. Equity and Quality: Orientation and Processes

(Conclusion) optional no more than 2 pages

- Indicators 2000 until 2013.
- Text, tables and figures should be in *times new roman*.
- For each figure you include in the report please add in appendix one excel document (.xls) with the total numbers in tables.
- Whenever possible, pinpoint year corresponding to beginning of the crisis in your country (for instance, starting year of austerity measures).

National Report Structure

Introduction

The analysis of the indicators should encompass a diachronic vision for each country, ensuring comparability and perception of trends as well as possible points of inflection between them.

SECTION A: BACKGROUND (maximum 6 pages)

Introduction to section A

In this section will be discussed the socio-economic and political national contexts, influencing the educational policy and the level of performance of each educational system, as well as some of the "impacts" from education (employment rates, for example); on the other hand, indicators characterizing each national educational system. Once the main goals of the project are related to the levels of equity expressed by national Educational Systems within crisis context, it is also important to collect data on Social Inequalities and Scholar Inequalities (either using national statistics or research results from previous studies). The proposed analysis should serve as background information for the project and its subject-problem framework.

SECTION A.1. National Context description (maximum 3 pages)

- a) The qualification structure of the population, levels of social and educational inequality.
- b) Political Cycles (from 2000 to the present) – an overview on educational policy-making and its evolution (e.g., major trends in educational measures on access to education, school success, educational compensation measures,...);
- c) Main educational policy since the beginning of the European financial crisis -- the Troika's intervention (Greece / Portugal) and the political "packages" of specific austerity measures (Spain / Italy).

Recommended indicators:

(data must be organized, whenever it is possible, by: gender; age groups, ethnic minorities, immigrants and descendants of immigrants ; regional distribution)

1. Qualification of the Population 25-64 years of age
 2. Employment Rate and Unemployment Rate (25-64 years of age)
3. Gini coefficient of equivalised disposable income;
4. At-risk-of-poverty rate (cut-off point: 60% of median equalized income after social transfers);
5. Child poverty rate.
6. Educational Funding (state/families): Public Expenditure on education (% do PIB) / Family expenditure on education (% do PIB), Private share on educational funding.

SECTION A.2. Description of the Educational System (maximum 3 pages)

Start this section by presenting your country's Educational System Diagram.

- a) Indicators describing the school system in its function and main characteristics -- starting firstly by presenting your country's Educational System Diagram (see proposal in appendix); secondly, describing the school system as an organization in its levels of autonomy and the roles of the main key actors; and thirdly, by giving information on the main structural characteristics of the education systems: ages of compulsory and optional schooling; pre-schooling attendance (mean age, minimum and maximum age), the level of the offer in terms of vacancies and schools; offers in adult education and for students with disabilities. Comment if, since the current financial crisis in Europe, there were any changes referring to: minimum and maximum ages (if applied) for enrolment in the first year of pre-school, primary school, lower secondary, upper secondary and tertiary education (for both compulsory and optional schooling); length of each education level (from pre-school to upper secondary); adult education., and students with disability.
- b) Students' distribution by available pathways – regular educational pathways; vocational and training systems; adult education; and students with disability (if possible, distinguish between public and private schools).

Recommended indicators:

(Data must be organized, whenever it is possible, by: gender; age groups – except on cases where ages are already defined; ethnic minorities, immigrants and descendants of immigrants; regional distribution)

1. Teachers and students numbers (total numbers, from 2000 to the present);
2. Numbers of public and private schools (total numbers, from 2000 to the present);
3. Level of educational offer in terms of vacancies and number of schools (considering the different schooling levels – pre-schooling, primary, secondary, tertiary, vocational and training education)

4. The structure of educational provision: how do transitions occur (since first transition, does it imply tracking, compulsory school guidance, national exam); existing tracking for different education levels, and possibilities of permeability between tracks;
5. Percentage of students by gender; age groups – except on cases where ages are already defined; ethnic minorities, immigrants and descendants of immigrants; regional distribution)
6. By different educational levels: enrolment rates; drop-outs rates; retention rates.

SECTION A.3. Processes and Mechanisms of Monitoring and Evaluating the Educational System
(maximum 6 pages)

1. Discuss the use of international tests like TIMMS, PIRLS, PISA, ..., European Reports and recommendations, in the “domestic” policy making;
2. Describe the Educational statistics production/publication: on the regularity of data collection, the main sources, dissemination of results and transparency of the system in your country;
3. Describe the processes of assessment of the educational system performance which type and regularity, such as the institutions in charge of monitoring, evaluation and assessment of the school system (examples: national examinations as a mean of system assessment; external or internal assessment of schools, etc.);
4. Describe the processes of schools’ autonomy in your country.
5. Describe the procedures of teachers recruitment and professionalization; as well as the training of teachers and other educational agents.

SECTION B: CRISIS IMPACTS IN EDUCATION

Here we aim to discuss equity and quality in educational policies, identifying how crisis has impacted in the equality of opportunities to access different channels and levels within each educational system and the outcomes of the implementation of educational policies.

B.1. Equity: Policies and achievements (maximum 15 pages)

Start this section by discussing the evolution of equity according to your national context and educational system. For the remaining parts, please focus on the evolution of policies regarding educational access and success. Analysis should include social support measures to socio-economic disadvantaged students/families; family’s expenditure on education; participation in education for early childhood education; special educational support for

students with disabilities; pathways to higher/tertiary education, vocational and training education; adult education; lifelong learning actions.

Recommended indicators:

1. Percentage of students with schooling social support – organize data by educational level attendance and nature of the institution: public or private.
2. Expenditure per student (%);
3. Pre-schooling enrolment rates (if possible, organize the data by nature of institution: public or private; mean age of attendance, and for those with more than one year enrolment)
4. Participation rates of children with disability (%)
5. Participation rates of students with ethnic minority background, immigrants and descendants of immigrants;
6. Early School Leaving Rate (%) (if possible, by gender and social origin, ethnic minority background, immigrants and descendants of immigrants)
7. Selectivity on tracking and transitions processes;
8. Retention Rates (%) (whenever possible, by school level, gender, age, social origin, ethnic minority background, immigrants and descendants of immigrants);
9. Specific national/political programmes for improving scholar performance (ex in Portugal Territorialização de Políticas Educativas de Intervenção Prioritária (TEIP – Territorialization of Priority Education Policies Intervention), National Reading Plan; Offer and types of Curriculum Enrichment Activities);
10. Population with the upper secondary attainment (%)
11. Population with the tertiary attainment (ISCE 5 A or B) (%)
12. Percentage of population aged 25-64 below secondary attainment (whenever possible, by gender, and social origin, ethnic minority background, immigrants and descendants of immigrants);
13. Percentage of adults within vocational and educational system;
14. Global evolution of PISA results (since 2000 until 2012)

Final notes on Equity and Quality: Orientation and Processes (maximum 10 pages) (“old” B2)

Present the final balance of the report by referring and commenting the most relevant indicators, trends and policy measures analysed in the previous sections. Here refer to those indicators, trends and policies which revealed to be crucial in explaining and understanding the orientations of each national educational system, evaluating them in terms of quality and equity during the period under analysis.

In sum, educational quality is here examined from the perspective of the performance of the education system, mainly the guaranty of equity. The impacts of the crises, if any, should be emphasized. The notions of orientations and processes are not to be the object of analysis themselves, but to guide the choice of the main facts and indicators of the concluding remarks. This is to say that these indicators are showing trends in policy orientations and the way these trends are being affected by the crisis.

Data Analyses and presentation:

In general terms, data must cover the evolution from 2000 to the present (the most recent data available). Data should distinguish whenever possible two periods: before 2008, and since 2008 onwards – i.e., before and after the financial crisis in Europe. This diachronic analysis should express the potential impacts of the crisis in the evolution of the indicators, measures and policies under analysis.

Glossary

Early School Leaving

Generally refers to a person aged 18 to 24 who has finished no more than a lower secondary education (or the equivalent of compulsory education) and is not involved in further education or training; their number can be expressed as a percentage of the total population aged 18 to 24.

School Drop-out

Students who drop out the educational system in a single year without completing or repeating the attended grade level

Grade retention

Practice in which children are required to repeat a grade level in school because failing to meet required benchmarks or grade level standards.

Gini coefficient of equivalised disposable income

The relationship of cumulative shares of the population arranged according to the level of equivalised disposable income, to the cumulative share of the equivalised total disposable income received by the population.

At-risk-of-poverty rate

The share of people with an equivalised disposable income (after social transfer) below the at-risk-of-poverty threshold, which is set at 60 % of the national median equivalised disposable income after social transfers.

Child poverty rate

The percentage of children living in households below 60% of equivalized median income before housing costs.

Immigrants

Foreign-born individuals of at least one foreign-born parent, independently of one's own nationality.

Ex: Individual born in Cape Verde of non-Portuguese parents, coming to Portugal when completing 7 years old, independently of his current nationality.

Descendants of immigrants

Individuals born in the country, who are children of at least one foreign-born parent, independently of parents' and of one's own nationality.

Ex: student born in Portugal, children of foreign-born Cape Verdean parents who naturalized Portuguese recently (or not), independently of students' current nationality.

Ethnic minorities of non-immigrant background

Nationals born in the country, who share a distinctive culture, and have non-immigrant background from their parents.

Ex: National Roma individuals, children of national parents born in Portugal.

2. Meetings and documents for Partners

2.1 - First Meeting Agenda

1st Workshop

Meeting Agenda – 1st Workshop

Project: Educational Challenges in Southern Europe

Date: 22nd and 23rd of November, 2013

Location: ISCTE-IUL, Lisbon

Hours:

22, Friday:

15h30 – 17h

17h – 17h20 – Coffee Break

17h20 – 19h00

23, Saturday:

9h30 – 11h

11H-11h20 – Coffee Break

11h20-12h

Preparation for Meeting:

Please read and reflect on: Analytical Grid proposal;

Please bring: your proposals concerning your own objectives and perspective;

Agenda Items

- | | |
|----|--|
| 22 | 1- A briefly presentation of our Project and objectives. |
| | 2 - Stabilization of the Analytic Grid, dimensions and indicators. |
| | 3- Discussion and debate of topics to create a new analytical field considering Policy-Making in Education and main actors involved. |
| 23 | 4- Discussion on Reports Structure. |
| | 5- Discussion on Dates (please consider the timetable) |

Project's email and platform for communication:

ecse.project.2013@gmail.com – please consider “Google Drive” for sharing documents.

Pass: crisis2013

Portuguese Team contacts:

João Sebastião: joao.sebastiao@iscte.pt ; phone: 969053827

Ana Rita Capucha: anarita.capucha@gmail.com; phone: 917651262

Project title: Educational Challenges in Southern Europe. Equity and efficiency in a time of crisis

Task	Task Denomination	Partner responsible for task	Partners involved in task	Phase	2013												2014												2015									
					6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5										
1	Analytical Grid	CIES-IUL	CIES-IUL	1	6	7	8	9	10	11	12																											
2	Final Analytical Grid	CIES-IUL	All	1					10	11	12																											
3	Reports Structure	CIES-IUL	All	1						11	12																											
4	Collecting Data	CIES-IUL	CIES-IUL	2	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12															
5	Collecting data for National Studies	CIES-IUL	All	2								1	2	3	4	5	6	7	8	9	10	11	12															
6	National Studies Production	CIES-IUL	All	2											4	5	6	7	8	9	10	11	12															
7	Comparative Analysis	CIES-IUL	CIES-IUL	3																		10	11	12	1	2	3	4	5									
8	Results and Final Seminar	CIES-IUL	CIES-IUL	3																				11	12													
	Reports	CIES-IUL	All																																			
	Meetings									1st																												

P - briefly progress report
N - National Studies
F - Final Report

2.2- First Meeting Topics of Discussion

Educational Challenges in Southern Europe. Equity and efficiency in a time of crisis

Research line: Crisis; Education Systems; Southern Europe; Policy-Making

Context

- Economic and budget crisis are affecting educational and training systems in southern countries. Signs of public disinvestment on education are being detected.
- In what ways these impacts can jeopardize the achievement of common educational and social objectives in Europe (Agenda 2020), as well as preventing the overtaking of the crisis, are some of the issues that these countries are facing.

Objective

Develop a systematic survey of the impacts of this crisis:

- In education and training systems and countries performance.
- On policy-making.
- On system's ability and capacity for promoting educational equity.

Methodology and analytical focus

Phase 1 Performance on education:

- Collecting indicators – Common analytical grid

Phase 2 Change and Innovation in Policy making:

- Domestic policies; European tendencies; Policy trends.

Phase 3 Effects of the crisis on the system's ability and capacity for promoting educational equity:

- Comparative analyses
- Results

2.3 - First Meeting - Analytical Grid for Discussion

Educational Challenges in Southern Europe. Equity and efficiency in a time of crisis

Introduction and Main Objective

Over the last decades, the performance of the educational systems in Southern Europe showed, in different rhythms and paths, a significant improvement and convergence towards the average European schooling rates. This tendency can be illustrated through the evolution of some key indicators as the early school leaving, which has declined substantially or better performances in tertiary education and long life learning. However, when compared with other member states, performance remains below European levels showing that a long path of educational efforts is still necessary to accomplish the goal of achieving educational levels near the European average. In this scenario the economic and budget crisis are affecting educational systems in southern countries, as signs of public disinvestment on education can be widely detected. In what ways these impacts can jeopardize the achievement of common educational and social objectives in Europe (Agenda 2020), as well as preventing the overtaking of the crisis, are some of the questions that these countries are facing.

Considering the previous issues, we aim to develop a systematic survey of the impacts of this crisis on the performance of educational systems, the resources allocation and to identify the solutions which are proposed in each country to confront the constraints imposed by the economic and financial recession and the pathways to further educational development.

Analytical focus

Considering the crisis and its impacts on the education system performance and on policy-making trends, as the key axes of the project, we've been working in an analytical framework with three major dimensions:

1) **Indicators of Performance** (2000 – 2013) – collecting and analysing major indicators on access, success and quality within the Educational System, as well their dynamics and key agents involved;

2) **Change and Innovation in Policy making** (2000 - 2013) – establishing a timeline in what has been produced on the education policy field (2000 - Lisbon Strategy), which includes international demands or agendas; establishing or detecting differences on policies or even trends in educational policy; and at last but not least, developing the diachronic perspective as a comparative method for analyses ;

3) Effects of the crisis on the system's ability and capacity for promoting educational equity.

This sketch of an open analytical framework assures that national specificities are considered and accepted by all the analytical dimensions and, simultaneously, that the comparative goal is also achieved, what will allow us to describe the effects of the crisis on education and predict tendencies of evolution.

Considering these dimensions a set of questions can be developed:

With the advent of the information society and the acceleration of the globalization processes, has there been a shift in the goals attributed to education and training systems in Southern Europe? Are these changes oriented to maintain social selectivity and ensure a set of qualified workers according to the requirements of a segmented market, or do they aim to produce qualification for the entire population by revealing a comprehensive line on policy-making and on educational agenda? Which will be the risks of the neo-liberal agenda and the austerity politics on education and its particular impacts on the trajectory of convergence of the Southern European countries? As international financial entities are forcing southern European countries to cut down their funding on education, the challenge remains how to guarantee efficiency and equity in the educational systems.

Finally, it will be relevant to capture the ideological dimension of this process: concerning the impacts suggested by the severity of the economic crisis, can we differentiate the effects resulting from measures to combat the budget crisis from the options taken independently of this particular context, which provided an opportunity for the reorganization and reorientation of policy-making on education?

Methodology and Project Phases

As it has been determinate on our proposal that the research will be drawn upon comparative policy methodologies, and will be supported by sources for data collecting such as: Eurydice, Eurostat, OECD, ESSROS (The integrated system of social protection statistics), CEDEFOP.

It's intended to combine this type of information with data from national studies and evaluations, organized in a common analytical framework. This will enable not only the analysis in depth of the education systems in southern Europe, but also to observe how each one are being affected by the crisis and what answers were found to deal with it.

Data collection will be driven by several questions or topics that should be answered through the strategic indicators identified on the table. Teams are also encouraged to use other indicators or data considered relevant for their national context. These questions have an open approach but, simultaneously, a well delimited compared framework. In fact, one of the most innovator factors to be considered on our comparative methodology is the actual partnership within the analytical steps, which can introduce a more qualitative and comprehensive line towards each national context, rather than focusing only on major data provided by international reports or networks, or even, on databases that not include specific national evidences.

We can identify mainly 3 phases of the project:

The current phase, which includes:

Step 1 –The Analytical Grid proposal and collecting data.

Step 2-Template and reports structure

The workshop will enable the stabilization of the national reports structure underlying analytical grid. Firstly, data has to be collected through some major statistical indicators using international reports or databases. Secondly, national teams need to considerer their own national contexts, meaning that, whenever teams find difficulties in collecting data, new options must be relocated in order to maintain the target goals. Thirdly, teams must take into account other dimensions in order to establish the analytical grid. These dimensions are more related with policy analysis, as well, with the key agents in policy-making. It provides a much more dynamic vision that otherwise wouldn't be capture, if we only develop a statically approach. Once this dimension are both connected with European orientations as well domestic politics, and in order to capture all the essential domains, this grid must be developed at the workshop with all members contributes.

Second phase:

Step 3- Reports Production

And final phase

Step 4- Comparative analyses and main results.

These last phases will be developed after the conclusion of the first ones.

Analytical Grid

Dimension	Analytical Topics	Questions	Key Indicators
System description	<p>Describe the Education System of your country considering these topics:</p> <p>Institutional Design</p> <ul style="list-style-type: none"> • Organization • Structure • Network <p>historical patterns of education development</p> <p>Governance</p> <ul style="list-style-type: none"> • Agents • Policy-Making <p>Funding</p> <ul style="list-style-type: none"> • National covering • Territorial distribution • Budget transferences • Families contributes • Contributes from European Social Fund 	<p>-Public expenditure, % GDP</p> <p>- Structure of the State Budget:</p> <p>Values -Budget, in% GDP, spent per student;</p> <p>-Values-budget as% of GDP by educational area/ teaching level;</p> <p>-Weight-spending on education in the family budgets;</p>	

	<p>Public and Private Sectors</p> <ul style="list-style-type: none"> • Their extension in Education Systems 	<p>Considering the questions of access, describe the development and the impacts of public and private sectors in Education System. Please considerer the years between 2000 and 2013 and the following topics:</p> <ol style="list-style-type: none"> a) Their extension and weight considering each teaching level and educational area; b) State Funding or investment; c) Availability and choice of schools; d) Level of demand; e) Level of privatization; f) Evolution of the policy-making – considerer the major changes and key agents involved (for instance: teachers, families, UE...) 	<ul style="list-style-type: none"> - Distribution of School Places; - Funding and public expenditure; - Students enrolment rates;
<p>Guaranty of the access</p>	<p>Infrastructures and equipment</p> <ul style="list-style-type: none"> • Sufficiency • National covering /Schools Network • Distribution of equipment • Quality of facilities 	<p>Considering the questions of access and the development of infrastructure and schools equipment, between the years 2000 – 2013, describe the following topics:</p> <ol style="list-style-type: none"> a) Coverage of the network, referring to the number of establishments (public and private; by areas and levels of education ;) b) Significant regional differences; c) Occupancy rates; c) Distribution of equipment at schools and asymmetries – please take in consideration the asymmetries regarding, for example, the distribution of material by educational areas, scientific and technical areas...; d) The existence of strategic programs for schools renewal or modernization or even specific investments on equipment; e) Network of schools prepared and equipped for areas of special education or other specific areas; f) Evolution of the policy-making – considerer the major changes and key agents involved (for instance: teachers, families, UE...) 	<ul style="list-style-type: none"> - Number of schools – total; type; teaching level; residence area (public/private) - Students/ Schools ratio

	<p>School offer and demand</p> <ul style="list-style-type: none"> • School offer • Conditions for the Access • Places • Universally • Evolution of the demand 	<p>Considering the questions of access, describe the development of school offer and demand, between 2000 and 2013, in regard to the following topics:</p> <p>a) Types of offer – regular; alternative pathways; VET system...</p> <p>b) Number of schools places and enrolment ratios</p> <p>c) Distribution of school offer considering the availability of schools</p> <p>d) Levels and conditions of access (considerer regular pathways, alternative pathways, VET system and special education)</p> <p>e) Relate the early school phenomena with the evolution of the offer</p> <p>f) Relate the priorities established within a EU context and the investments conducted in your country political agenda</p> <p>g) Evolution of the policy-making – considerer the major changes and key agents involved (for instance: teachers, families, UE...)</p>	<p>- School Enrolment ratio – type/cycle; students ex and age;</p> <p>-Attendance rates;</p>
	<p>Schooling Social Services</p> <ul style="list-style-type: none"> • Expenditure • Families • Students access and success 	<p>Considering the questions of access, describe the development of Social School Support and families aid strategies, between 2000 and 2013, in regard to the following topics:</p> <p>a) Levels of public expenditure allocated to Social School Support.</p> <p>b) Evolution of beneficiary families – numbers and brief characterization.</p> <p>c) Weigh of the initial social conditions at students success and access – consider specific groups such as ethnical minorities; immigrants; persons with disability</p> <p>d) The main and most applied modalities of Social School Support - food support; accommodation; economic aid; assistance in accessing curriculum materials (books, specific material) ...</p> <p>e) Measures attending the modalities of Social School Support. Who is entitled to what and why?</p> <p>f) Relate the levels of access to the education system and the application of measures within the Social School Support.</p>	<p>-Public expenditure on Social school support as% of GDP;</p> <p>- State expenditure on Social School Support, categorized by modality;</p>

		g) Evolution of the policy-making – considerer the major changes and key agents involved (for instance: teachers, families, UE...)	
Guaranty of Success	Human Resources <ul style="list-style-type: none"> • Numbers • Sufficiency • Qualification • Training 	Considering the questions of success and the development of Human Resources at schools and education in general, between the years 2000 – 2013, describe the following topics: a) Numbers: teachers; higher technical; administrative staff... b) Ratio Teachers/Students ... c) Ratio Special Needs Educational Professionals/ Students with Special Needs d)Teachers Training and qualification e) Policies for professional access f) Teachers Unemployment rates g) Priorities on teacher training, staff mentoring (influences) h) Evolution of the policy-making – considerer the major changes and key agents involved (for instance: teachers, families, UE...)	-National numbers of staff and teachers; -Ratios; - Unemployment rates
	Educational strategies for school success <ul style="list-style-type: none"> • Sectorial and strategic Plans • Curriculums • Results 	Considering the questions of success and the development of strategies to support students and their results, between the years 2000 – 2013, describe the following topics: a) Sectorial plans designed to combat school failure b) Sectorial plans or curriculum areas intended to support study and teaching c) Priorities on the design and development of scholar curriculums; d) Impact of tests and benchmarking strategies on scholar results; e) Principal indicators of success such as: Early Scholar Leaving; Graduation rates; Completion rates; results at international students assessments (PISA, TIMMS..) f)Evolution of the policy-making – considerer the major changes and key agents involved (for instance: teachers, families, UE...)	- Attendance rates - Early scholar leaving rate -Graduation rates; -Completion rates; -Results on PISA, TIMMS...

	<p>Policies on Education</p> <ul style="list-style-type: none"> • Sectorial Programmes • Educational Projects 	<p>Considering the questions of success and the Social Policies on Education, between the years 2000 – 2013, describe the following topics:</p> <p>a) Programs designed to combat school failure and prevention of early school leaving;</p> <p>b) Educational Projects to combat failure and early school leaving;</p> <p>c) Territorial distribution of these programs considering the school network;</p> <p>d) Evolution of the policy-making – considerer the major changes and principal actors involved (for instance: teachers, families, UE...)</p>	<p>-Attendance rates;</p>
	<p>Families Strategies</p> <ul style="list-style-type: none"> • Investment at education • Parental Participation 	<p>Considering the questions of success and families strategies on education, between the years 2000 – 2013, describe the following topics:</p> <p>a) the use of extracurricular school support (eg, study tutoring);</p> <p>b) Importance of complementary and extra-curricular structures, for supporting school studies - Study Centers, Tutoring Centers..</p> <p>c) Levels of parental involvement and participation, formal and informal, at the educational system,- parents associations, representatives on school bodies;</p>	
<p>Quality assurance</p>	<p>Evaluation and monitoring</p> <ul style="list-style-type: none"> • System • Schools • Teachers 	<p>Considering the questions of success and evaluation, between the years 2000 – 2013, describe the following topics:</p> <p>a) Mechanisms of evaluation applied to school´s system in general - who does this assessment? Which entities? Does it have an external component? Who provides the parameters?</p> <p>b) Monitoring school success. How? (national and international mechanisms)</p> <p>c) Monitoring the success of sectorial programs. How?</p> <p>d) Evaluation system for teachers</p>	<p>- assessments processes and results</p>

		e) System for assessing the quality of infrastructure and equipment f) Strategic results g) Participation in International assessments	
--	--	--	--

2.4 – Second Meeting

Agenda – 2nd Workshop

Project: Educational Challenges in Southern Europe

Date: 10th September, 2014

Location: ISCTE-IUL, Lisbon (room still to be confirmed)

Hours:

9h30 – 11h

11h – 11h15 – Coffee Break

11h15 – 12h30

Preparation for Meeting:

Please bring: your country report, independently from its stage.

Agenda Items

1- Country reports

Preliminary version: state of art, delays, questions and suggestions concerning both the guidelines and the data sent for the national reports;

Final version: deadline, before the end of 2014;2 - Stabilization of the Analytic Grid, dimensions and indicators.

2- Interview with a national expert on educational policies: guidelines, script, questions and suggestions;

3- Final report: guidelines, state of art, questions and suggestions, and deadlines

4- Final meeting and conference: guidelines, structure, suggestions, and deadlines

Portuguese Team contacts:

João Sebastião: joao.sebastiao@iscte.pt ; phone: (00351) 969053827

Ana Raquel Matias: raquel_matias@hotmail.com; phone: (00351) 929016124

Ana Rita Capucha: anarita.capucha@gmail.com; phone: (00351) 917651262

3. The four national reports

a) Portugal

**ECSE Research project: “Educational Challenges in Southern Europe.
Equity and Efficiency in a Time of Crisis” (2013-2015)
University Institute of Lisbon**

CIES-IUL

Research team: João Sebastião (coordinator), Luís Capucha, Maria Álvares, Patrícia Ávila, Pedro Abrantes, Susana da Cruz Martins, Ana Rita Capucha, Pedro Estêvão, Ana Raquel Matias, Sofia Amâncio

list of tables and figures	27
a1. National context description	29
annexes	29
a2. Educational system.....	40
anexes.....	49
a3. Processes and mechanisms of monitoring and evaluating the educational system	60
b1. Equity section	70
Participation and access.....	Erro! Marcador não definido.
adult's education initiatives.....	Erro! Marcador não definido.
school population diversity – ethnical background, immigrants and special education.	Erro! Marcador não definido.
Attainment and schools results – levels of success and failure	Erro! Marcador não definido.
describing the population attainment: indicators.....	Erro! Marcador não definido.
retention rates indicator.....	Erro! Marcador não definido.
pisa results indicator.....	Erro! Marcador não definido.
strategies for promoting success and equity	Erro! Marcador não definido.
educational expenditure /funding	Erro! Marcador não definido.
annexes	86
b2. Conclusive notes	91

List of tables and figures

Tables

A1. National context description

Table A1.1 Gini Coefficient, in EU27 and Portugal (2000-2012)

Table A1.2. Risk of poverty rate (%), by sex, in Europe 27 and Portugal, 2000-2012

Table A1.3 State Expenditure on Education, as a % of GDP

A2. Description of the educational system

Table A2.1 Annual change rates in the number of enrolled young secondary

Table A2.2 Number of Resource Centres for Inclusion, in Mainland Portugal, between 2009 and 2014

Table A2.3 Number of Resource Centres for Inclusion, by NUTS 2 regions. 2013/2014

Table A2.4 Applicants and holders (No.) of financial support (subsídio) for special education

B1. Equity: Policies and achievements

Table B1.1 - Pre-School Enrolment - Pre-primary education (level 0), % in relation to the same age total population and in relation to the same age total population

Figures

A1. National context description

Figure A1.1 Men and women at risk of poverty rate, in EU-27 and Portugal (2000-2012).

Figure A1.2 Evolution of educational attainment (%), by sex

Figure A1.3 Evolution of educational attainment (%), by age groups

Figure A1.4. Evolution of the employment rate (%), by sex, age

Figure A1.5. Evolution of the unemployment rate (%), by sex, age

Figure A1.6. Evolution of the employment rate (%), by age groups and ISCED

Figure A1.7 Evolution of the unemployment rate (%), by age groups and ISCED

Figure A1.8 Private expenditure on education as % of GDP

A2. Description of the educational system

Figure A2.1. Number of teachers in Portugal, for all educational levels, 2000-2012

Figure A2.2 Number of teachers in Portugal, by all educational levels, 2000-2012

Figure A2.3 Number of students in Portugal, by educational levels, 2000-2012

Figure A2.4 Evolution of the number of young people enrolled in secondary education and vocational courses, public and private, in mainland Portugal (2000-2012)

Figure A2.5 Evolution of the number of young people enrolled in vocational education

Figure A2.6 Trend in percentage of youth enrolled in secondary vocational education

Figure A2.7 Trend in percentage of youth enrolled in secondary vocational education

Figure A2.8 Financial support for special education (in EUR, mainland Portugal (2009-2014)

Figure A2.9 Evolution of the number of students with SEN, by cycles and levels of education, Mainland Portugal (2009-2014)

Figure A2.10 Participants in early education - as % of inhabitants of the corresponding age group, in Portugal, (2000-2012)

Figure A2.11 Participants post-secondary non-tertiary education- as % of inhabitants of the corresponding age group, in Portugal, (2005-2012)

Figure A2.12 Participants first and second stage of tertiary education- as % of inhabitants of the corresponding age group, in Portugal, (2000-2012)

Figure A2.13 Participation/ Enrolment in education by sex age ranges, all ISCED (1-6) - as % of corresponding age population

B1. Equity: Policies and achievements

- Figure B1.1 - Financial aid to pupils as % of total public expenditure on education, by ISCED level, in Portugal and EU-27 (2000-2010)
- Figure B1.2 - Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents, in Portugal (2000-2010)
- Figure B1.3 Early School Leaving by gender and labour status (%), in Portugal
- Figure B1.4 Percentage of total population aged between 15 and 74 with Upper Secondary and Post-Sec
- Figure B1.5 Participation/ Enrolment in education, by sex, of students at ISCED level 3-GEN - as % of all students at ISCED level 3, in Portugal onday attainment, in Portugal
- Figure B1.6 Percentage of total population aged between 15 and 74 with tertiary attainment, in Portugal
- Figure B1.7 Percentage of population aged 25-64 below secondary attainment, in Portugal (2002-2012)
- Figure B1.8 Participation rate in education and training (total) by age groups, in Portugal

A1. National context description

While making an effort to join the euro zone and participating in the process of the new currency, Portugal featured among countries with the lowest levels of growth, productivity and competitiveness, besides expressing historical structural problems. The qualification structure of the population, maintaining great shares of individuals with lowest levels of qualification, along with a progressive retraction in the demographic configuration - less younger population and increase of the older ones, with direct effects on the structure of the labor market and also pressing our activities rates.

Even before the crisis of 2007/2008, international financial agencies such as IMF argued that Portuguese economy had an anemic productivity and a low economic growth, with a large budget deficit and likely prospect of competitive disinflation (Blanchard, 2006 quoted by Pedroso 2014). We are now testifying that, after the austerity imposed by the Memorandum of Understanding, the above mentioned problems were aggravated, launching the country into recession, with devastating consequences both to economic and social conditions (*ibidem*). With the outcome of the crisis in 2008, Portuguese banks were majorly affected and levels of external debt increased dramatically, as pursuing credits became extremely difficult. Since the first negatives evaluations made by the rating agencies – such as the ones of Moody’s agency, marking Portugal with a “junk status” at 2011 – Portugal entered in a vicious cycle, with the growth of public debt and of the deficit , a fragile balance trade, which were already fragile since the euro adhesion, incapable to uphold a return to growth, and the austerity adopted as the main path to overcome the crisis, compromising Portuguese families and workers. What was considered to be a financial crisis quickly become an economic crisis bursting into an ongoing socioeconomic crisis.

In the period considered, Portugal had two centre-left governments formed by the Socialist Party (XVIInd Constitutional Government 2005-2009 and XVIIInd Constitutional Government 2009-2011) which were followed by a centre-right coalition government (XIXth Constitutional Government, 2011 - until present). These offices worked alongside with the EU implementing policies and adjusting programs. In 2010, they searched for troika assistance [European Commission (EC), European Central Bank (ECB), and International Monetary Fund (IMF)]. The late austerity measures affected mainly the working classes, with massive dismissal in public and private sector as well as cuts on public policies (salaries, allowances, pensions and other social benefits) (Abrantes, 2014).

In general terms, national reports consider unemployment to be one of the major negative consequences of the crisis, with no impression of what is to be expected from social protection policies. Unemployment rates increased considerably - especially youth unemployment - leading to an increase in social inequality. According to Eurostat data, long-term unemployment represented 63,5% of all unemployment in early 2014. Ongoing impoverishment, job insecurity and deprivation acute of materials among families (Cantante, Carmo, 2014; Observatório das Desigualdades) are the main consequences.

Education was not exception, considering the funding policy and specific educational sectors, such as adult's education. On the contrary. Although Portugal has a non-linear trend in the evolution of its education indicators and outcomes, we can highlight the effort to enter a pathway of recovering in the last decades, particular since 2001 with the Lisbon Agenda advent. More recently, in the period of 2005-2009, we can observe important signs of progress and convergence toward European standards, mostly in Adults education, the Vocational Education, the development of Science and the tertiary education and attainment.

In the national context, income inequalities are changing the country's social structure and creating relatively enduring gaps in the social tissue.

Considering the present-day context, the scenario becomes alarming as the austerity policies are having impacts on redistributive schemes and national wages. An analysis of the "Gini Coefficient" for the last 12 years shows improvements in the income inequality levels for all income groups (from 36% in 2000 to 34,5% in 2012). Nevertheless, with the peak of the economic crisis 2009/2010 and the implementation of the austerity package in 2011/2012 we observe a slight increase in the Gini coefficient (Table A1.1). We may assume, however, that the level of income inequality and distribution among all income groups has always been more significant in Portugal than in the EU 27 average. Similar conclusions can be drawn when analyzing the "At-risk-of-poverty rate", showing a decrease between 2000 (21%) and 2012 (17,9%), though remaining higher when compared to EU 27 average (17.1%), and higher among women (18,2% against 17,5% for men); in 2012 these rates demonstrate Portugal's higher risk of poverty compared to the EU27, even if both have been progressively approaching (Table A1.2 and Figure A1.1).

Media and Portuguese agencies of statistics studies and inequalities studies have been reporting, in a regular everyday basis, poverty and social inequalities as a major concern in Portuguese society, as the indicators are reaching "historical" levels. For

instance, late INE's report (2014) stated that one in five Portuguese is at risk of poverty, 2 million Portuguese living below poverty line and more than a quarter living in great material deprivation (INE, *Rendimento e Condições de Vida*, 2014). Recent OCDE's reports (OECD, "Doing Better for Family", 2011) showed that Portugal was the 8th OECD's country to have the highest rate of "child poverty risk". Except for a decrease between 2004 and 2007 (from 24,2% to 20,8%), Eurostat data shows a relatively persistent high rate which has been increasing ever since, up to (21% in 2012), remaining closer to the EU27 average (Figure A1.2).

Social inequality levels are related with the education context. In a long term, education has its impacts in social and economic context of a country, for instance considering poverty and the possibility of overcoming the familiar background, but, on the other hand, we can assume that poverty has almost an immediately impact in Education – for instance, in relating the scholar results with social background or, the levels of resources, family's income.

As we have seen, despite the significant improvements in educational results and in the education system's performance (eg., Early School Leaving results) an educational deficit persists since the policies that produced the good results of the last decades were reversed. It is predictable that the low levels of educational attainment among Portuguese population are continuing to be particularly onerous for the persistence of social inequalities. Even if we detected improvements between 2000-2012 (Figure A1.2) considering the population aged between 25-64 -the numbers of those with lower secondary (0-2 ISCED) attainment decreased 19,8 p.p, while those with higher education (5-6 ISCED level) increased 12,5 p.p), - data stills shows a significant proportion of this segment – 25-64 - with only the primary or basic educational attainment (ISCED 1) - 60.8% in 2012; or the secondary or post-secondary non-tertiary education (ISCED 3-4) 20,2% in 2012; and 19% with higher education (ISCED 5-6) in 2012. Moreover, for those with higher education aged between 25-64 years old, women are clearly more predominant (22,5% against 15,3% of men) (Figure A1.2).

Considering the smaller range of age groups, we observe, on one hand, that primary or basic is more significant in oldest age groups with 55-64 and 45-64 (80,2% and 72,8% respectively); while youngsters (25-34) are the more representatives in higher education attainment (28,8% ISCED 5-6). Nevertheless, these younger groups still present considerable proportion (42,1%) of individuals with only the primary or basic level (Figure A1.3). This is a structural problem linked with the historical expansion and

dynamics of our schooling process. Even though this is a diminishing tendency, we are still facing the early school leaving problem, which stands as one of the highest of the EU, as well as with a labor market structure that absorbs low qualified youngsters. However, we may assume that this relation, between labor market and low qualified people, may be different in this recent context of crisis where major unemployment rates are mostly affecting the youngest.

The employment for the same period indicates a considerable decrease during the last 13 years. For 25-64 year old, employment rate decreased from 75,5% in 2000 to 68,3% in 2013, with 2008 representing the most evident phase of this appalling change. Generally, women were the most affected (64,9% in 2013), though gender differences were already observed in 2000 (66,9% against 84,5% for men) (Figure A1.4). On the course of this decrease, we sign a sharp rise in unemployment rates: for the same age group the figures were 3,6% in 2000 reaching an astonishing 15,3% in 2013 (increased by 11,8%) (Figure A1.5.). Here, the youngest ones were the most affected: for those aged between 15-24 there was an increase of 28,9 %, with a current rate of 37,7%; while for those aged 25 - 29 there was a climb of 17,5 %, with a rate of 21,9% in 2013 (Figure A1.5.).

When analyzing the employment and unemployment rates by individuals' educational attainment, we can confirm, on the one hand, that younger individuals (aged 30-34) were strongly affected by the decline in employment rates, particularly when holding a higher educational level - showing a decline in the employment rate of 15,3%; while this was of 10,9% for those who held basic education. Nevertheless, and on the other hand, qualification and education remains an important tool for preventing employment decline and unemployment: for individuals aged 25-29 with basic and primary education, employment rate dropped significantly (23,1% less), while those holding a higher education diploma decreased slightly less (16,5 %) (Figure A1.6.). Even though unemployment rates became high among youngsters with highest qualifications (20,6% of those aged 25-29 having higher educational attainment are unemployed, compared to 37,8% of those aged 15-24 with the same education degree), the lowest educated individuals tend to be more critical for maintaining unemployment rates, meaning that more education still prevents job loss. For instance, considering those aged between 25-29, unemployment rates increased about 12,1% when having higher education, while significantly more (about 21,5%) for those with primary education (Figure A1.7).

Since 2005, Portuguese educational policies invested in the increase of school attendance and attainment, as well as in the improvements of the schooling results and the education system performance. Portugal had been following a path of convergence towards European standards, where policy was marked by traces of continuity in the demand for these results and consequent convergences. This occurred also despite some differences seen in domestic policy-making, characterized by two main periods: From 2000-2004, a stage mostly marked by significant legislative production and the expansion of schooling; from 2005-2010, a stage marked by policies targeting the increasing of school success and the modernization of schools' infrastructures, and respective results. During the last decade, we may highlight the increase of compulsory education to 12 years of schooling; results in fighting against early school dropouts; the reinforcement of adults' education and training options and adult's educational attainment; and the development of the vocational and training courses.

Entering in the crisis period, several signs of reversal can be noticed, not only due to the financial retraction, but also due to the recent political choices. The withdrawal of the existing program qualifying adults, "Novas Oportunidades" leaving the system without any valid option; the introduction of "curricular learning goals" in specific school subjects; the disappearance, or restructuring, of measures supporting students' success (eg. National Plans for reading and teachers training in math); and a shift in the educational paradigm characterized by the introduction of a teaching-learning system based on more selective exams at all levels and on the gradual depreciation of competences in the learning processes.

Nevertheless, the most prominent impacts of the crisis are yet to be understood, specifically, when analyzing the public expenditure on education (analyzed further on section 2). Expenditure on education as a percentage of GDP remained approximately the same until 2010, with a slight increase on the private expenditure (0,45% in 2012) (Figure A1.8). However, national data sources indicate a tendency of significant cuts: National Statistical Institute (INE) showed a decrease of 1,2% p.p. on educational public expenditure between 2000 and 2012 (representing a negative growth on expenditure of 20%); National Budget Direction (PORDATA/DGO) showed a decrease of 1,1% for the same years (representing a negative growth on expenditure of 22%),. The decline is explained mostly by the expenditure retrenchment: decrease of employed teachers (Table A1.3), together with the salary reduction in public administration along with other current

expenses and the restrictions implemented in national programs like “Parque Escolar”, particularly responsible for the renovation and modernization of secondary schools.

By pointing out clear signs of regression in Portugal, we argue that budget cuts and recent political choices may jeopardize some of the previous achievements (eg., increase of adult’s qualification and training and decrease of early school dropouts). Lastly, taking into account the effects education has on overcoming crisis, this should be a highly protected sector.

Annexes

Table A1.1 Gini Coefficient, in EU27 and Portugal (2000-2012)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU27	:	:	:	:	:	30,6	30,2	30,6	30,8	30,4	30,4	30,7	30,5
Portugal	30	37	:	:	37,8	38,1	37,7	36,8	35,8	35,4	33,7	34,2	34,5

Source: Eurostat

Note: : = Not available

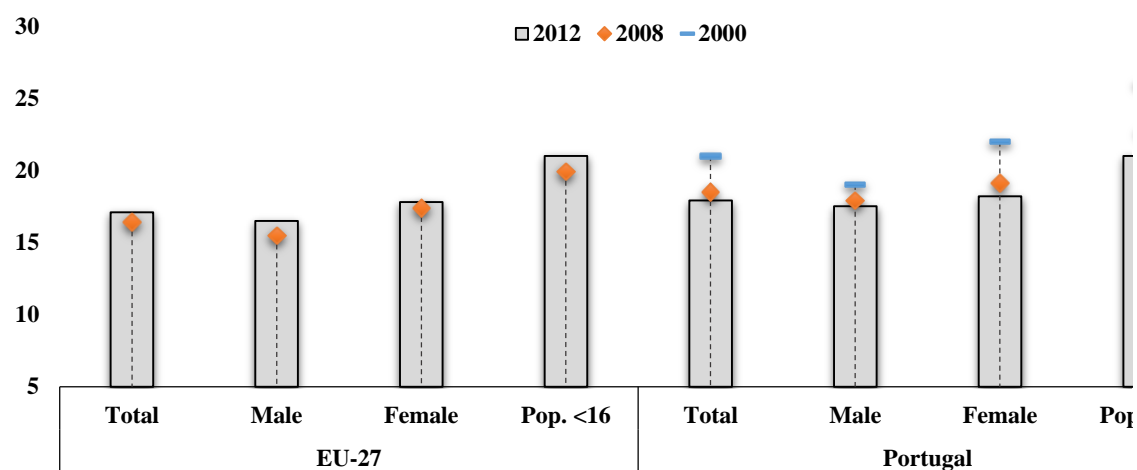
Table A1.2. Risk of poverty rate (%), by sex, in Europe 27 and Portugal (2000-2012)

	Total		Males		Females	
	EU 27	Portugal	EU 27	Portugal	EU 27	Portugal
2000	:	21	:	19	:	22
2001	:	20	:	20	:	20
2002	:	20	:	:	:	:
2003	:	19	:	:	:	:
2004	:	20,4	:	19,2	:	21,6
2005	16,4	19,4	15,6	18,7	17	20,1
2006	16,5	18,5	15,7	17,7	17,2	19,1
2007	16,5	18,1	15,7	17,2	17,3	19,0
2008	16,4	18,5	15,5	17,9	17,4	19,1
2009	16,3	17,9	15,4	17,3	17,1	18,4
2010	16,4	17,9	15,6	17,3	17,0	18,4
2011	16,9	18	16,1	17,6	17,6	18,4
2012	17,1	17,9	16,5	17,5	17,8	18,2

Source: Eurostat

Note: : = Not available

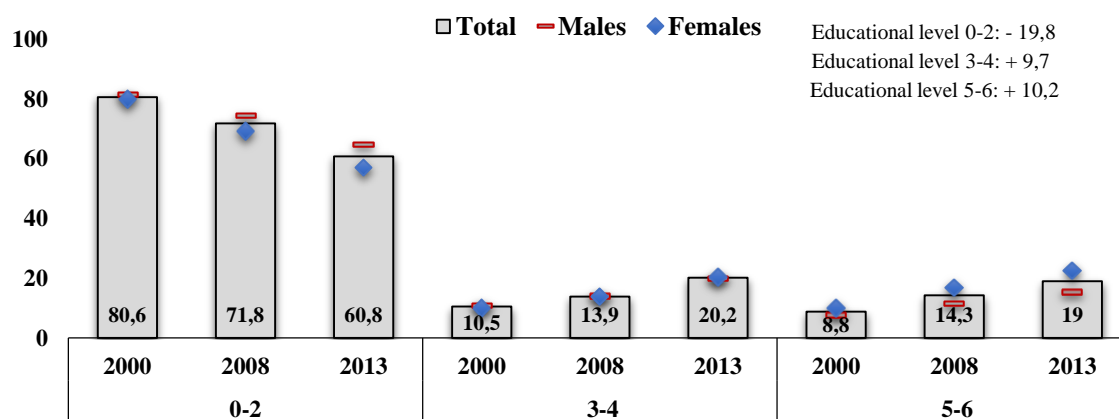
Figure A1.1 Men and women at risk of poverty rate (60% of median equivalised income after social transfers), and youth age less than 16 years old, in EU-27 and Portugal (2000-2012).



Source: Eurostat

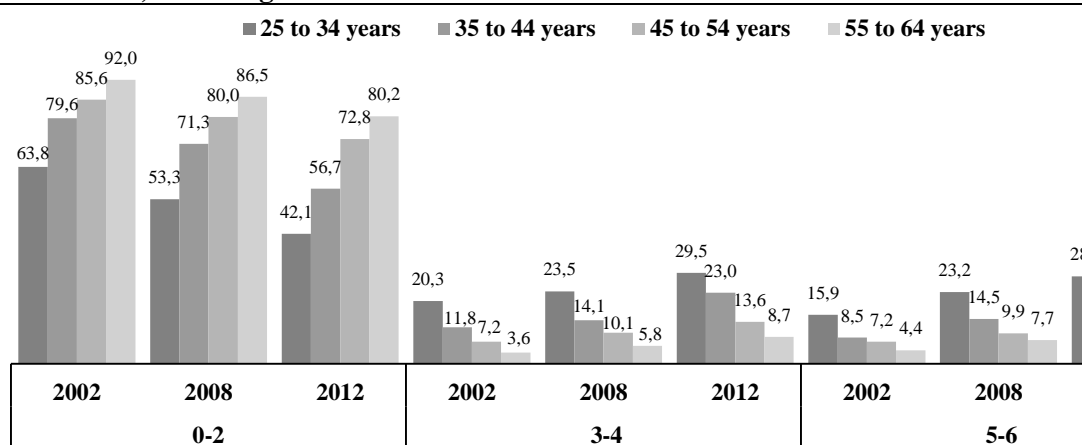
Note: Data for EU27 for 2000 is not available

Figure A1.2 Evolution of educational attainment (%), by ISCED and sex, between 2000 and 2013, in Portugal



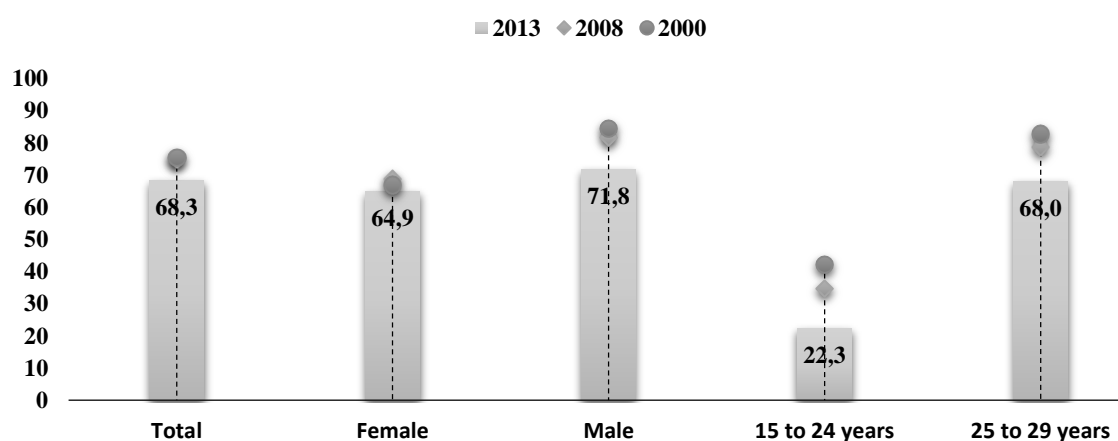
Source: Eurostat

Figure A1.3 Evolution of educational attainment (%), by ISCED and age groups, between 2000 and 2013, in Portugal



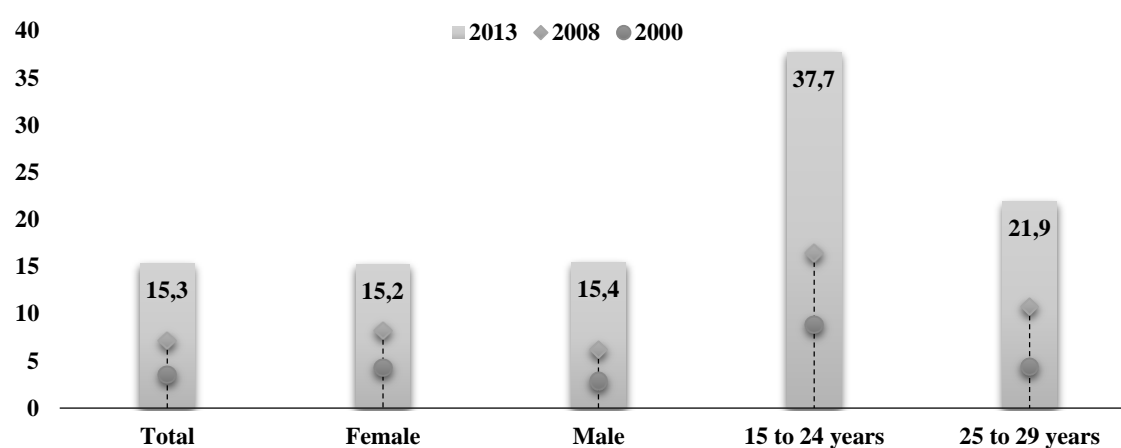
Source: Eurostat

Figure A1.4. Evolution of the employment rate (%), by sex, age (25-64 years) and among youth (15-29 years), between 2000 and 2013, in Portugal



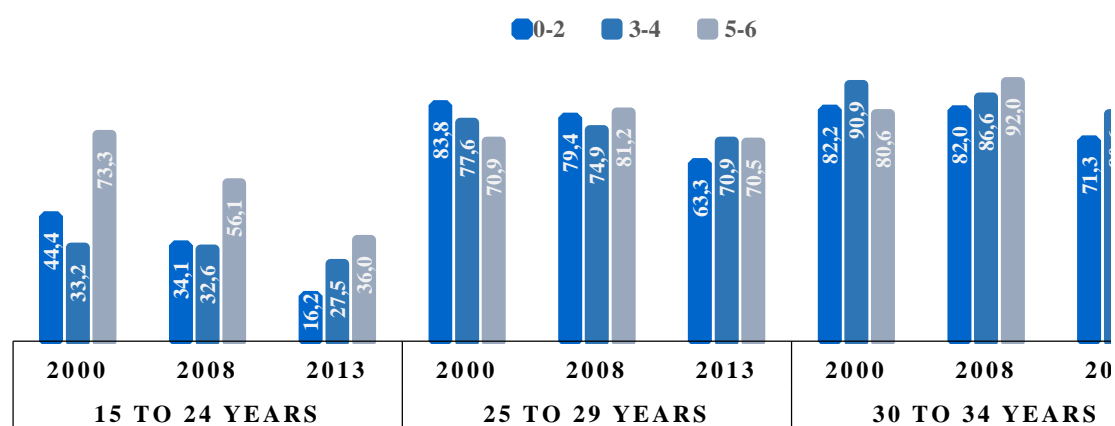
Source: Eurostat

Figure A1.5. Evolution of the unemployment rate (%), by sex, age (25-64 years) and among youth (15-29 years), between 2000 and 2013, in Portugal



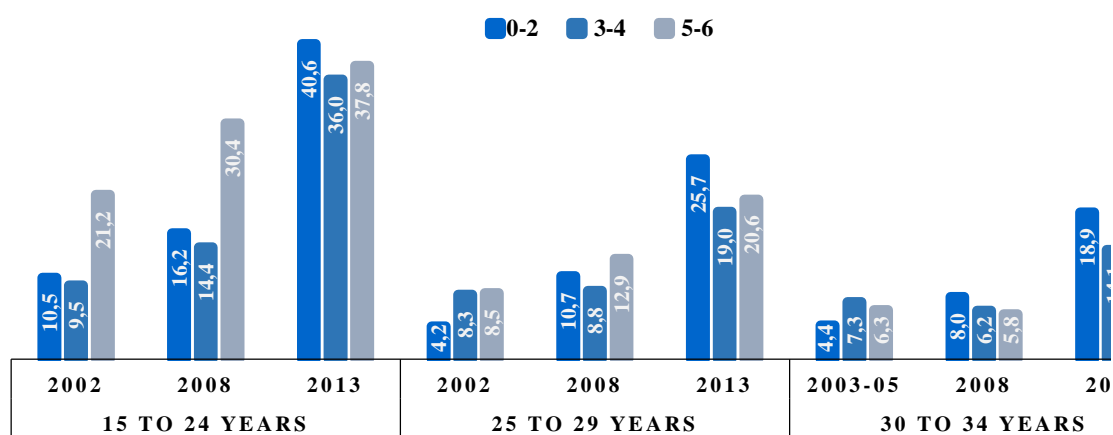
Source: Eurostat

Figure A1.6. Evolution of the employment rate (%), by age groups and ISCED, between 2000 and 2013, in Portugal



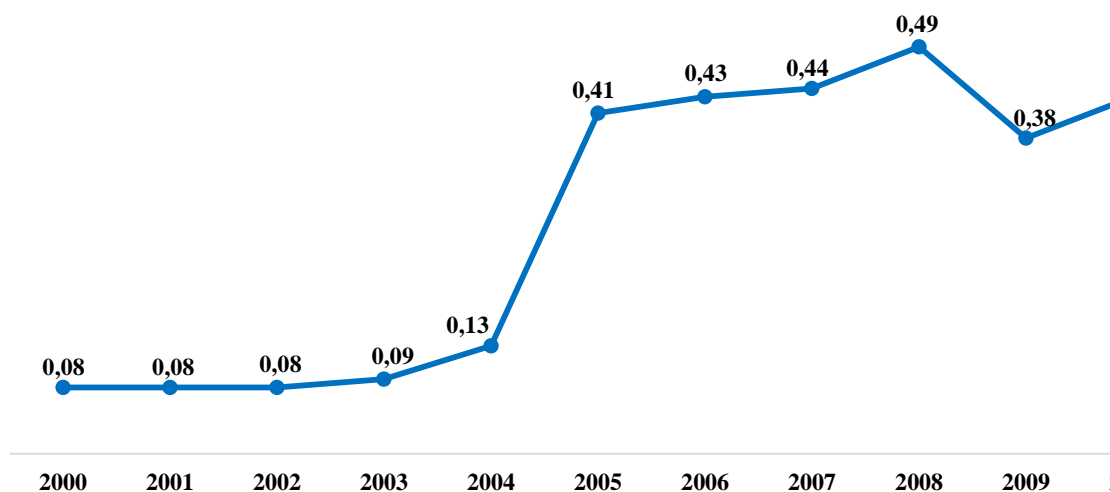
Source: Eurostat

Figure A1.7 Evolution of the unemployment rate (%), by age groups and ISCED, between 2000 and 2013, in Portugal



Source: Eurostat

Figure A1.8 Private expenditure on education as % of GDP



Source: Eurostat

Table A1.3 State Expenditure on Education, as a % of GDP

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<i>Eurostat</i>	5,4	5,4	5,3	5,4	5,1	5,2	5,1	5,1	4,9	5,8	5,6	:	:
<i>INE</i>	6,1	6,2	6,3	6,2	6,4	6,5	6,2	5,7	5,6	6,0	6,3	5,7	4,9
<i>Pordata/DGO</i>	5,1	5,2	5,4	5,1	4,9	4,9	4,7	4,4	4,3	5,0	5,0	4,6	4,0

Source: Eurostat**Note:** : = Not available

A2. Educational system

Compulsory education

Since 2009 compulsory education corresponds to free education, from age 6 to 18, divided between basic and upper secondary education¹. Basic education lasts for 9 years and is divided into three cycles. The 1st cycle with four years of schooling from 6 to 10 modal ages; the 2nd cycle with two years of schooling from 10 to 12 modal ages; and lastly, the 3rd cycle with three years of schooling from 12 to 15 modal ages (corresponding to the end of lower education, ISCED 2). Upper secondary education comprises three academic years (including 10th to 12th grades), from 15 to 18 modal ages, combining different curricular routes which in general converge in accessing to tertiary education plans (see *Portuguese diagram* in appendix).

Currently, the last two stages of compulsory education, namely the 3rd cycle of basic education and upper secondary, include dual certification and courses geared towards further study. This means that vocational education and training cycles may last 1-6 years, beginning at 15 years old and are organized in school networks including both general and vocational education (either in private vocational schools or in consortium of public and private entities). The guidance of students foresees the choice between vocational and general courses (from 3rd cycle to upper secondary)², a transition implying tracking though with some degree of permeability. In general, the existing options allow to complete compulsory education and to access tertiary education.

To put in a nutshell, all compulsory education stages provide general courses (for basic level)/scientific and humanistic (for upper secondary), Artistic Courses (for all levels), and training through a dual regime (school and work context). Students risking to overcome compulsory educational maximal age at each stage have second further specific opportunities. For instances, for those dropping out, having drop out or needing requalification may complete compulsory or further education through Education and Training Courses (ETC) from 3rd cycle to upper secondary; students under 15 years old or overcoming compulsory education maximal age, with learning difficulties, risking social exclusion and/or school dropout, have Alternative Curriculum Paths (PACs) for

¹ Law no. 85/2009, August 27. This educational level is expected to cover all pupils in 2014-15, Since the entrance of Portugal in the European Economic Community (CEE) in 1986 and the new LBSE, until 2009, compulsory education was at lower secondary education level (e ainda é. Isso não mudou), i.e., nine years of schooling, and reintroduced vocational routes into the education system (extinct since 1977). (não percebo...

² The guidance of students always implies the parents' agreement though it may be suggested by the class council or director, knowing that in practice vocational guidance has usually followed a path of continued school failure

basic education levels; students aged 15 – 18 who are early school leavers or risking delinquent behavior, have the Integrated Program for Education and Training³ for the 2nd and 3rd cycle of basic education (PIEF) with adjusted schedules and curricula to individuals' skills and proficiencies, relational and citizenship skills and labour market demands; those under 25, who completed lower secondary or equivalent, dispose of an educational provision for upper secondary education including Technological courses (currently residual), Professional and Apprenticeship courses (initial professional training courses taught on the Vocational Training Centre Network⁴). Finally, to tackle school drop-outs or retentions for youth aged 13 or more, a very recently pilot experience foresees the possibility for vocational Courses during compulsory education and starting from the 3rd cycle of basic education, allowing progression to post-secondary non-tertiary professional education (a pilot-project from 2013/2014).

For the period in analysis (2000-2012) **teachers' and academic staff** (Figure A2.1 and Figure A2.2) show an important decrease. After increasing from 2000 to 2010 – until 2005 for primary education and for 2009 for lower secondary education – since 2012 that the number of teachers has decreased significantly. This loss was more significant for primary education (about 11 000 teachers less), followed by those in lower secondary (about 8 000 teachers less). Teachers' numbers in upper secondary fluctuated significantly more (with key variation years: 2004, 2007, 2012), with a recent loss of about 2000 teachers less.

The **number of students** for both public and private sectors (Figure A2.3) diminished also for primary education (about 12% less students between 2000 and 2012), while swaging for lower and upper secondary -- observing almost the same number of students when comparing 2000 to 2012. However, this apparent stability hides two different periods for these educational levels: if first students' numbers decreased significantly from 2000 to 2005/6 (about 10% loss for lower secondary, and 17% for upper secondary), in a second moment their numbers exploded, between 2005/6 to 2009 (38% more in lower secondary, 44% more in upper secondary), decreasing again until 2012 (about 16-17% less students for both educational levels).

³ Programa Integrado de Educação e Formação, PIEF

⁴ Under the responsibility of the Employment and Vocational Training Institute (Instituto do Emprego e Formação Profissional (IEFP)).

A more detailed analysis indicates further that, for upper secondary education, the number of students between 2000-2012 shows a moment of significant decrease for the general track (from about 300 000 to 200 000). The opposite is observed for the professional/vocational courses (from less than 50 000 to slight more than 100 000) -- showing the main growth of students in upper secondary. Indeed, the annual rates of students in upper secondary indicate a decreasing rate when referring to the general academic track (varying between -0,2% and -10%, though decreasing less since 2009/10), while a growing rate for the professional/vocational tracks (varying between 1% and 50%, particularly high from 2006/07 and 2009/10), though in 2010/11 and 2011/12 decreasing drastically their variation to 3% (Figure A2.4 and Table A2.1).

In sum, the general picture of students in upper secondary from 2000/01 to 2011/12 shows that: those in general education have decreased significantly, representing in a first moment more than 70% of total students and currently less than 60%⁵; those in technologic courses were 20% before but represent currently very residual numbers (around 2%); those in Apprenticeship, Education and Training Courses and Specialized Artistic have maintained their very residual proportions (less than 10% for the first, less than 5% for the second, and extremely residual for the latter); and differently from all the previous, those in professional courses increased significantly from less than 10% of total students in this educational level to more than 30%⁶ (Figure A2.5, Figure A2.6, Figure A2.7).

Special Educational Needs

Since 1996/97 pupils with Special Educational Needs benefit from specific support once integrated in regular and compulsory education – currently from 6 to 18 years old. During the last 10 years, there was indeed an increasing law regulation⁷, fruitful in creating the conditions for universal access and support for the public with specific needs as well as for the professionalization of the staff and teachers. From 2008 onwards, the already existing teachers in special education were able to create a network of expertise for

⁵ Total numbers: decreasing from almost 300 000 students to almost 200 000 students, i.e., around 100 000 students less between 2000/01 to 2011/12, source: DGEEC (GEPE) (2000-2012).

⁶ Total numbers: increasing from less 40 000 students to almost 120 000 students, i.e., around 80 000 students more between 2000/01 to 2011/12, source: DGEEC (GEPE) (2000-2012)

⁷ In 2004, the General Legal Basis of the Regime for Prevention, Schooling, Rehabilitation and Participation of Individuals with Disabilities (Bases Gerais de Regime Jurídico da Prevenção, Habilitação, Reabilitação e Participação da Pessoa com Deficiência), based on the International Classification of Functioning, Disability and Health (ICF, ONU); in 2006, the decree for the Special Education Framework (Quadro da Educação Especial);

Special Education through the Resource Centers for Inclusion⁸(CRI) and in all schools - for all levels of compulsory education and pre-school in public and private institutions, social solidarity and specialized resource centers. Since then it has been possible to develop sustainable Individual Education Plans⁹ (PEI) and Specific Individual Curriculum¹⁰(CEI), compulsory in all schools. With the National Strategy for Disability for 2011-2013¹¹(ENDEF) there is a regulation concerning students' post-schooling transition, i.e., covering the last three years of upper secondary and, in 2014, the current government created a working group to review the regulatory framework for special education.

The numbers of applicants and holders for special education monthly allowance (for those aged 24 or less, integrated in special needs education training in schools), varied from 2009/10 to 2013/14. After increasing until 2011/12 there was a radical decrease to about half from 2012/13 to 2013/14 (from 13 015 applicants and 11 480 holders to 7 165 and 6 560, respectively). Similarly, the number of teachers trained for Special Education, after increasing since 2009/10, has diminished substantially from 2012/2013 to 2013/14, with 507 teachers less. Similar radical cuts are observed for global available allowances for special education (independently from being or not granted) – after some stabilization between 2009/10 to 2011/12, and a growth during 2012/13, it decreased radically in 2013/14 from 26 million to 13 million (Table A2.4, Figure A2.8). In addition, the number of CRI has continuously dropped between 2009/2010 to 2013/2014 from 132 to 89, the supported organic unities from 637 to 571, and private special education colleges from 17 to 15 (Table A2.2, Table A2.3)

However, students engaged in CRI have in general increased (from 13 000 to 15 000), contrary to the decrease of students in colleges (from 884 to 677). When analyzing the number of students having access to special needs services from 2009/10 to 2013/14 by educational level, this general growth varies by school level: three times more in pre-school, two times more in primary education, between three to four times more in lower education, and about five times more in secondary education. However, specifically for primary education these numbers decreased recently of 1 283 students less in 2013/14 (Figure A2.9). Moreover, exception within this disinvestment has been also the early

⁸ Centros de Recursos para a Inclusão -- CRI

⁹ Planos Educativos Individuais, PEI

¹⁰ Currículo Específico Individual, CEI

¹¹ Estratégia Nacional para Deficiência, ENDEF

childhood intervention for special needs: teachers' numbers have been continuously increasing (more 34 teachers in 2013/14), together with the stabilization of the reference clusters for early childhood intervention (about 136 in 2012/13), and the growth of children's target (up to almost ten thousands, Table A2.1, Figure A2.9).

Non-compulsory education

Pre-primary education is the first step of the Portuguese Education System in a lifelong learning process, being an optional cycle for children from 3 to 5 year-olds, wherein the universality is enforced as a State guarantee for those 5 years or older¹². The public network is composed of education institutions under the Ministry of Education and Science and the Ministry of Solidarity, Employment and Social Security, while the private network is composed of for-profit and non-profit education institutions.

As referred previously, the number of pre-school teachers increased between 2000 and 2011 (Indicator 1 see appendix, from about 12000 to 17000), decreasing slightly in 2012. Similarly, the number of enrollments in pre-school (Figure A2.10) has continuously increased from 2000 to 2011 in about 47 000 more pupils (from 228 459 to 276 125), though with a slight decrease in 2012 to 272 547. Although the majority is aged 5, when analyzing by specific ages the growth is more significant among 3 years pupils between 2000 and 2012, followed by those aged 4 and 5 (though decreasing from 2011 onwards). The participation rate in pre-school has continuously increased from 2000 to 2012 -- from 77% to current 95% for all ages, being in 2012 78% for those aged 3; 92% for those aged 4; and above 97% for those aged 5 (Figure A2.10). However, like for the absolute numbers of pupils, 2012/13 indicates a slight decrease in these rates (and by age) as well as for the average length of pre-schooling from 2.68 years-length in 2011/12, to 2,65 in 2012/13 (Figure A2.10, A2.11, A2.12).

Post-secondary non-tertiary education¹³ is taught in higher education and non-higher education establishments, offering Technological Specialization Courses¹⁴(CET). These are mainly provided by higher polytechnical institutions, in upper-secondary teaching establishments (autonomous schools, either public and private or cooperative), in vocational training centers (network coordinated by the Employment and Vocational Training Institute, IIEFP), in technological schools (set up under joint ministerial

¹² Law no. 85/2009, August 27

^{13,13} Portaria nº989/99, Portaria nº392/2002, Decreto-Lei nº 88/2006 e Portaria nº782/2009

¹⁴ Cursos de Especialização Tecnológica - CET

dispatch), and other training institutions accredited by the Ministry of the Economy. They are designed for those aged 18 to 19 years and 23, awarding a qualification for levels 4 and 5 on the National Qualifications Framework (NQF). Data is available from 2003 onwards (Indicator 6 see appendix), showing increasing numbers from 638 attendances in 2003 to more than 9 000 in 2012, twice the number of men compared to women, the majority aged 20-24, followed by those 18-19 and those aged 25-29.

A diachronic reading of **higher education indicators** reveals an expansion of enrollments and graduations, resulting from an institutional diversification with the increase of public universities, polytechnics, from both public and private sectors. Overall, the evolution was not linearly and showing more oscillations concerning female students and the private sector: growing from 1990 until 2002/03 (from 150 000 to 400 000), decreasing until 2012 to 390 000 (Figure A2.15). Currently, higher education (ISCED 5-6) is divided in cycles: three years courses for the 1st cycle (bachelor degree); two years courses for the 2nd cycle (master degree); four years courses for the 3rd cycle (Doctoral degree). The latest figures released by the Agency for Assessment and Accreditation of Higher Education give an account of 5 128 accredited courses of which about half are from the 2nd cycle (master) and 696 PhDs.

The higher educational system includes university and non-university sectors (137 universities – 58% public sector; and 161 polytechnic – 60% public sector, see in appendix, Table A2.5). The main access of students has been centered in the public system, reinforced during the last 10 years, with the university sector being dominant compared to the polytechnics, the latter representing one third of the tertiary education's enrolment (with slight inflections in the growth of this subsystem in 2008 and again in 2011, [reference](#)). The number of vacancies has decreased in almost 4% during 2011-2013, while the number of inscriptions decreased in about 11% less (Table A2.6).

The **Agenda 2020** – the European strategy for overcoming the economic and financial crisis -- imposes demanding goals with regard to the certification of the younger generation at the higher education level: at least 40% in the age group between 30 and 34 until 2020, already in EU with 37% in 2013, and in Portugal with almost 29%. However, a counter fact is the current public expenditure on higher education in relation to GDP and the annual expenditure in higher education institutions per student – both indicating a wider gap between Portugal and the whole of the EU, breaking deeper from 2007, and again in 2011. In addition, since 2010/2011 there is a potential reversal of the

expansionary demand for higher education, given the decline of first registers and the widening gap between the numbers of those who are able to attend a degree and enrolling effectively (Table A2.6).

Data on **tertiary education** teachers indicates, contrary to compulsory education, a singular stability of about 37 078 teachers within time (Figure A2.2). And differently from compulsory education, students' numbers (Figure A2.3) increased though at a significant lower rate, growing between 2002 and 2004 followed by a break during 2006 and 2007, and again in 2012. Thus, even if from 2000 and 2012 there was a general growth of about 16 000 more students, a detailed analysis shows that from 2011 to 2012 tertiary education has, in reality, lost about 6 000 students. When analyzing these numbers by different age ranges, we can confirm that the main growth in tertiary education students is observed among the oldest students, i.e., for those aged 30 or older whose numbers have, in general, continuously increased from 51 251 to about 94 102 from 2000 to 2011. However, both the oldest (30 or more) and the youngest (less than 20) students do reverse from 2011 and 2012 (when tertiary education lost 5 869 students aged 30 or more, and 3 372 students aged less than 20). For the other age ranges, for instance aged 25-29, the decrease of students' participation occurs in a long run -- after a significant growth from 67 754 to 77 398 students between 2000 and 2003, there is a main loss of students to 57 894 until 2012. Similarly, there was a net loss of students aged between 20 and 24 from 2000 and 2012 (from 19 7092 to 174 489 students), though occurring during an early period (between 2005 and 2010).

Last but not the least, tertiary education maintains a higher participation of women compared to men during all the period in analysis, and gender gap decreasing significantly within time (from about 30% difference to 15%). Indeed, it was among female students that the loss of students in tertiary education was the most important – while the balance for the number of male students resulted in a increase from 2000 to 2012 (from 162 524 to 181 515), the balance for number of female students during the same period decreased (from 211 221 to 208 758). Concomitantly, we have observed a decrease of 17% in the total number of students benefiting from social support: from about 74 000 in 2010/11 to about 62 000 in 2013/14 – meaning a decrease of total students covered from 19% to

17%, and affecting particularly the students in the private sector (from 14% to 10% of total students in the later sector, compared to 20% to 17% in the public sector) (see in appendix, Figure A2.17).

The most longstanding measure for **adults' education** has been the recurrent education (since the Education Act 1986 - LBSE). It has been an educational offer framed as a special provision not integrated in the main educational system and mimetizing the educational, curricular and pedagogic programmes framed for children and youth in school age and daily school. After a period of discussion around the design and operation of this system (2000-2005), there was a new period of significant growth in terms of network Centres (2006-2008), followed by the stabilization of new operational structures (2009-2011). This process started with the creation of the National Agency for Education and Training of Adults in 1999 (ANEFA), the Adults' Education and Training courses in 2000 (EFA, with dual certification -- academic and professional); the creation of the Centers for Recognition, Validation and Certification of Competences 2000-2001; and, finally, the New Opportunities Initiative and the NO centers, substituting the main recurrent education offers in schools' clusters and training institutions between 2005-2011. As a result, recurrent education was reduced to a minimum since 2005¹⁵, when educational policies presented a significant effort to improve the qualifications of the Portuguese adult population.

The above mentioned measures allowed to promote the access to the 4th, 6th, 9th or 12th grades for adults, resulting in a significant growth of adults' education and training between 2007 and 2011 (from 4,4% to 11,6%, and to 10% in 2013, **reference 40 anos...**). Indeed, students' number by age groups (Indicator 8 see appendix) clear indicate that the period of significant students' growth for lower and upper secondary education occurred between 2007 – 2010, overlapping the increase of students over 20 years old, with the highest growth for those 40 or older. These figures reveal the impact of last ten years adults' education. However, we can also confirm a reversing trend from 2010-2011

¹⁵ A significant decrease on recurrent education can be observed from 2007/08 onwards, and particularly radical for 2011/12 (the most recent data available). If in 2001/02 adults engaging this education were 50 218 in basic education and 79 806 in upper secondary, in 2011/12 they have radically declined to 80 and 6 068 (respectively) – being true for both and public offers, and women and men alike (see in appendix tables 3.2.18 and 3.2.19, and figures 3.2.11 and 3.2.12, CNE Estado de Educação 2013, pp.151).

onwards, a trend that will be even more evident from 2013. This is due to the interruption of NO process since 2013, and adults' education taken on by the Qualification and Vocational Training Centres and the National Agency for Qualification and Vocational Training (Agência Nacional para a Qualificação e Ensino Profissional, ANQEP) – more focused on employability and less on education, thus, less present in schools and more in professional training centers.

National sources (CNE...) show clearly these evolutions: if for basic education adults' enrolment jumped from 14 811 in 2006/07 to 43 641 in 2007/08, and again to 159 149 in 2008/09 (mainly due to RVCC offers), it started to decrease since 2010/11 to 104 793 but most significantly in 2012/13 to 25 325 (see in appendix table 3.2.16, CNE Estado de Educação 2013, pp.149). A similar trend was observed when analyzing adults' participation in upper secondary education and training: from 47 177 in 2007/08 to 169 190 in 2008/09, and later 36 615 in 2012/13 (see in appendix table 3.2.17, CNE Estado de Educação 2013, pp.149). More recently, between 2012 and 2013, the number of EFA, RVCC and CNO promoters decreased to half or even less: a) EFA in basic education was reduced from 46 to 28 (existing mainly in professional training centers and not in public schools), while in upper secondary from 30 to 10 (in general) (see in appendix tables 3.2.21 and 3.2.22., CNE Estado de Educação 2013, pp.153); b) RVCC and CNO centers from 424 to 203 (see in appendix, Figure A2.18).

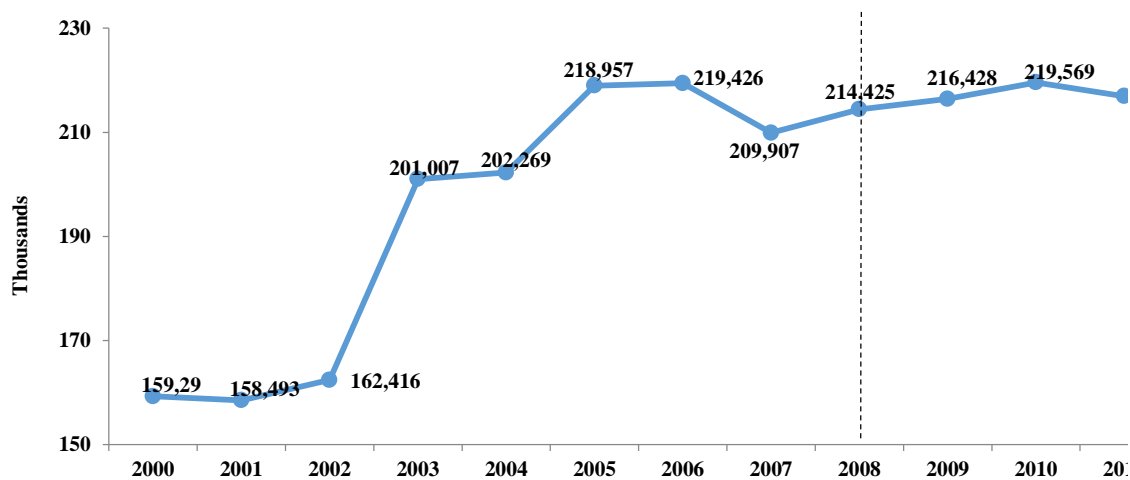
Last but not least, **enrolment rates for the population aged between 15 and 24** for the period under analysis (Figure A2.16) confirm previous studies conclusions of improvement, and for all levels of education (ISCED 1-6, from 51% in 2000 to 62% in 2012). This improvement is, as expected also, more significant if individuals are aged 16-18 compared to older ones (from 72% in 2000 to 89% in 2012). Gender differences indicate that since 2000, female enrolment is higher for those between 16 and 22 years old, while for the older population gender differences are either smaller or more unstable, but the improvement on population coverage observed from 2000 onwards has affected more the men compared to women.

See the other Portuguese diagram in appendix

Diagram: ou o integrado na página 111 do ultimo relatório do CNE (que poderei reproduzir no excell) ou estes dois clássicos:

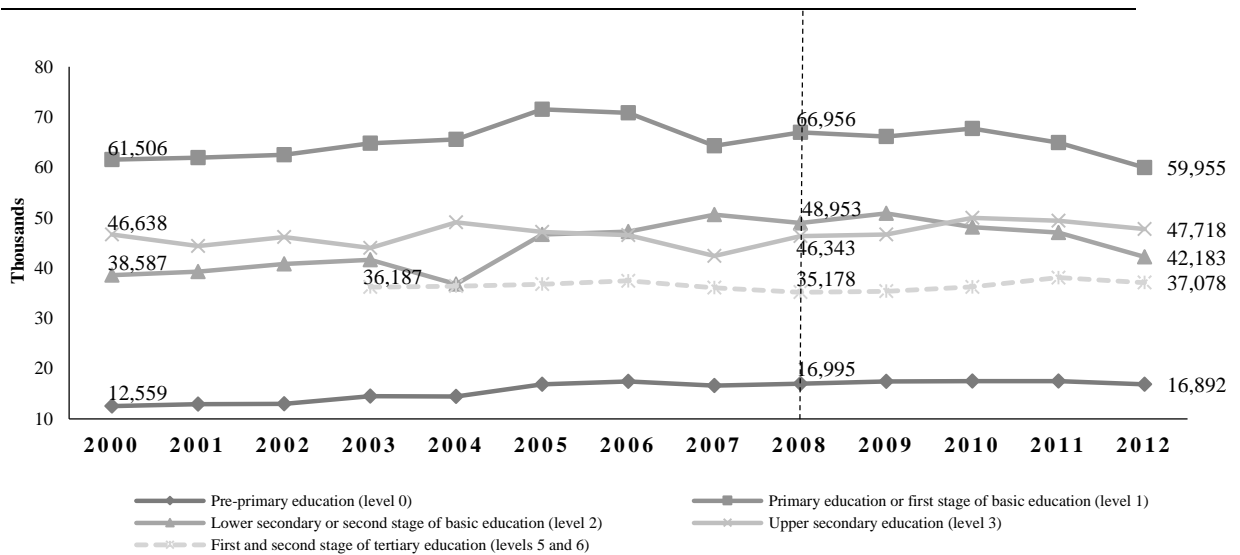
Anexes

Figure A2.1. Number of teachers in Portugal, for all educational levels, 2000-2012



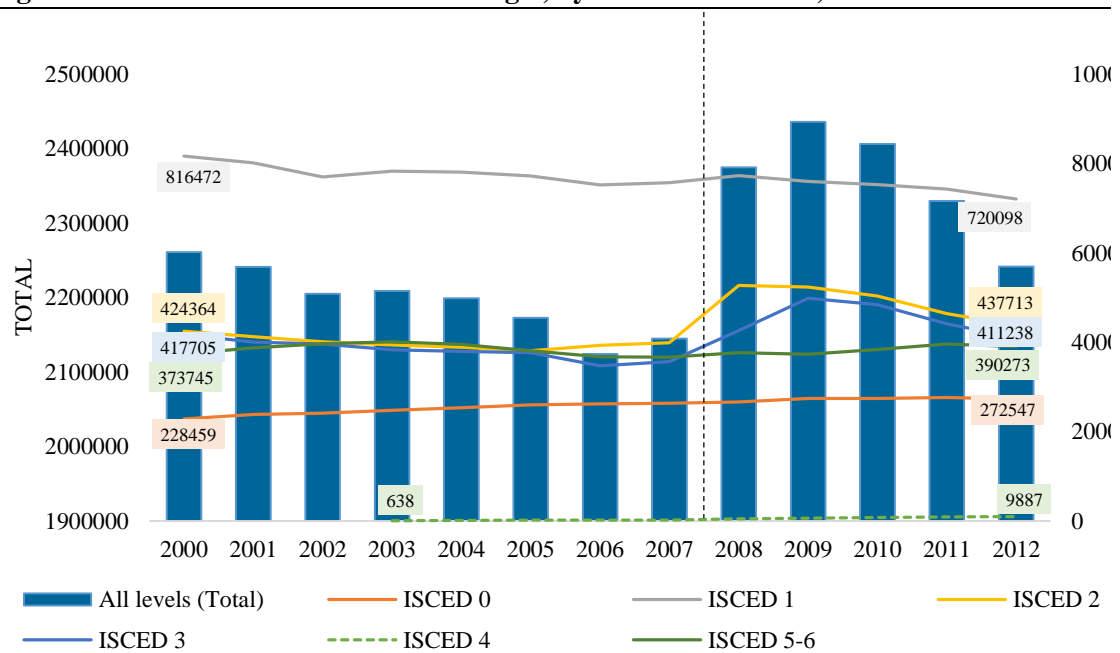
Source: Eurostat

Figure A2.2 Number of teachers in Portugal, by all educational levels, 2000-2012



Source: Eurostat

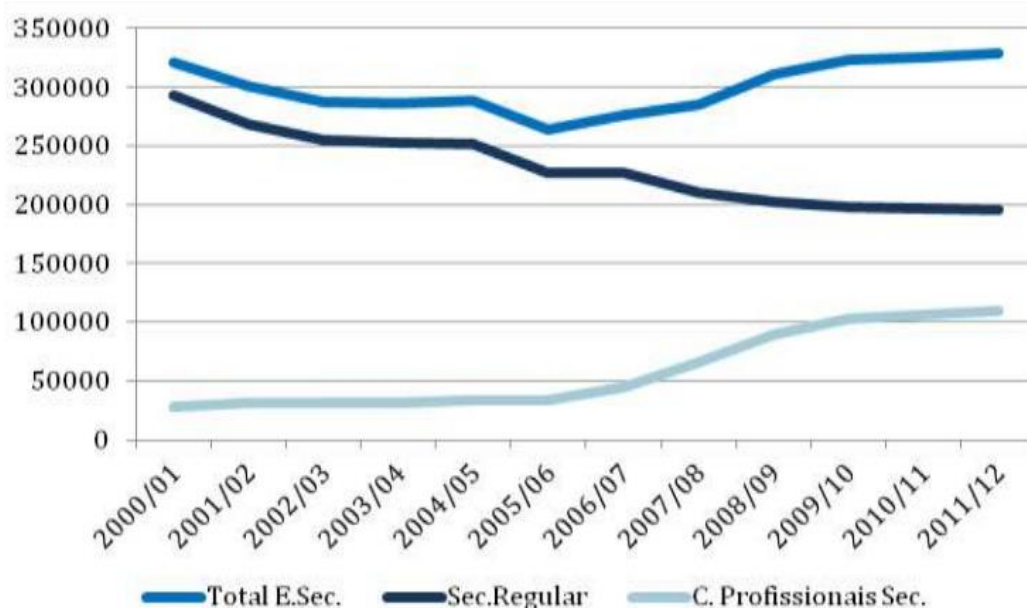
Figure A2.3 Number of students in Portugal, by educational levels, 2000-2012



Source: Eurostat

Note: ISCED 0 (Pre-primary education); ISCED 1 (Primary education or first stage of basic education); ISCED 2 (Lower secondary or second stage of basic education); ISCED 3 (Upper secondary education); ISCED 4 (Post-secondary non-tertiary education); ISCED 5-6 (First and second stage of tertiary education).

Figure A2.4 Evolution of the number of young people enrolled in secondary education and vocational courses, public and private, in mainland Portugal (2000-2012)



Regular upper secondary
(in walf-way)

Source: DGEEC (GEPE) (2000-2012) - Adapted from CNE Technical report Ensino e Formação Profissional Dual (2014), pp.16, Figure 2 (Gráfico 2)

http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profduoal.pdf

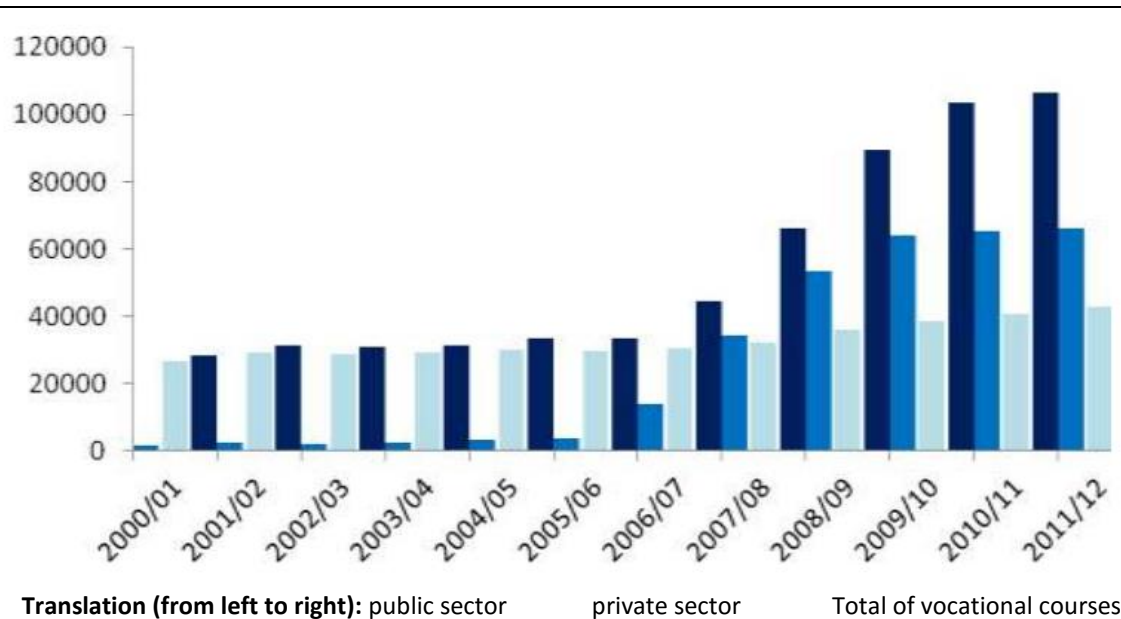
Table A2.1 Annual change rates in the number of enrolled young secondary, via education, public and private, in mainland Portugal 2001-2012 (%)

	2001/0 2	2002/0 3	2003/0 4	2004/0 5	2005/0 6	2006/0 7	2007/0 8	2008/0 9	2009/1 0	2010/1 1	2011/1 2
Upper secondary	-6,5	-4,2	-0,4	0,6	-8,3	4,7	3,2	9,2	3,8	0,9	1,1
Regular upper secondary	-8,1	-5,3	-0,9	-0,2	-9,6	-0,2	-7,3	-3,9	-1,9	-0,5	-0,9
Vocational courses	10,3	-1,9	1,8	7,3	-0,8	33,4	49,5	34,6	15,3	3	2,7

Source: DGEEC (GEPE) (2000-2012) - Adapted from CNE Technical report Ensino e Formação Profissional Dual (2014), pp.16, Table 1 (Quadro I)

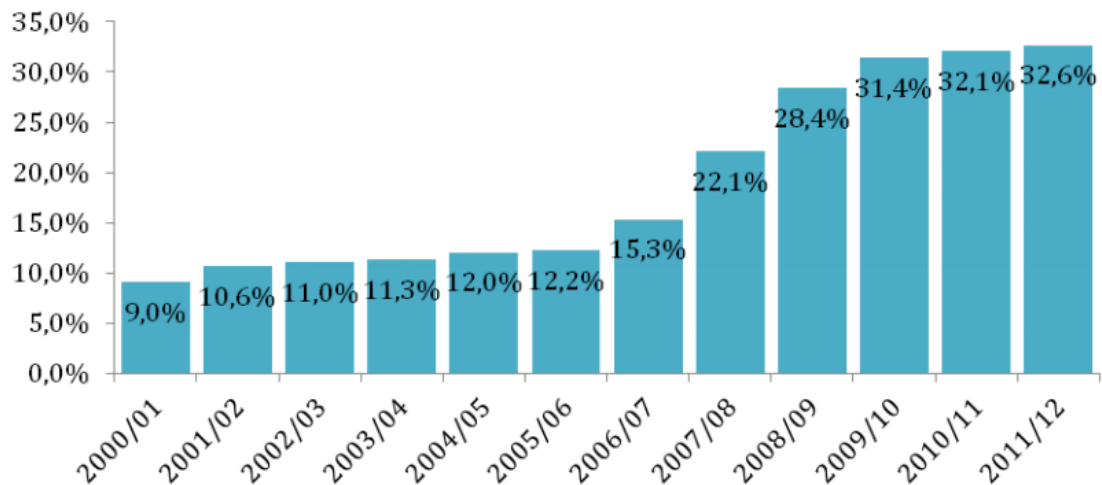
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profduoal.pdf

Figure A2.5 Evolution of the number of young people enrolled in vocational education (vocational courses at upper secondary), public and private, in mainland Portugal (2000-2012)



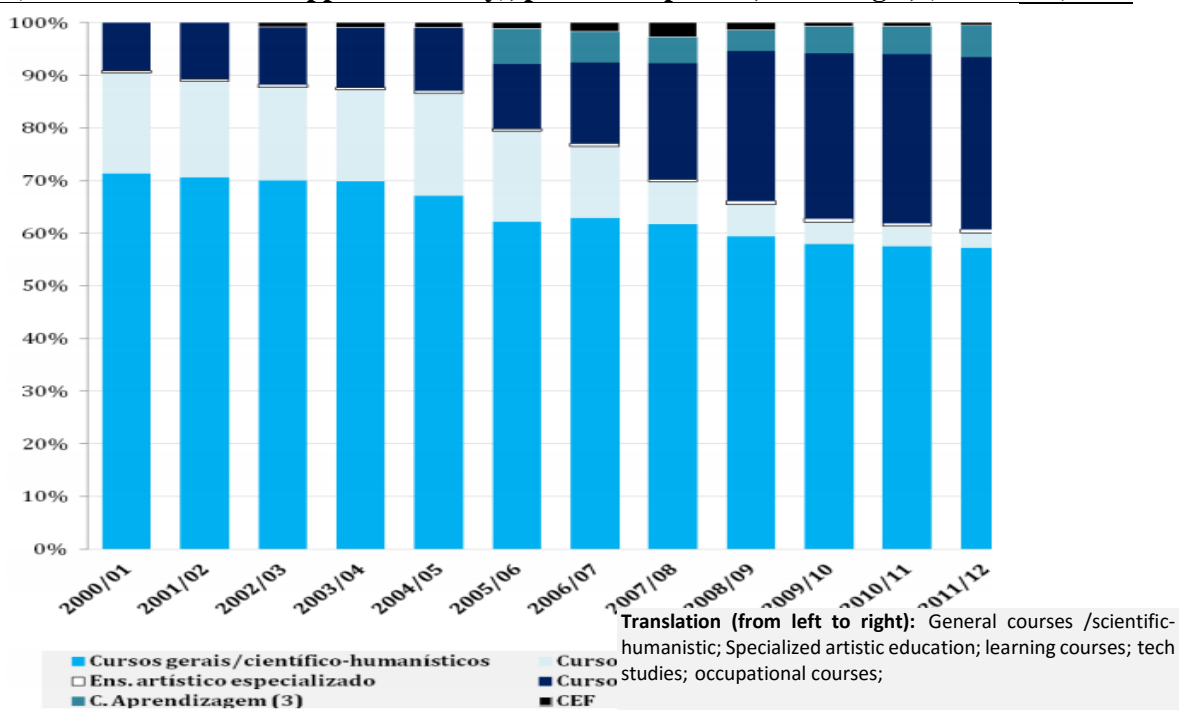
Source: DGEEC (GEPE) (2000-2012) - Adapted from CNE Technical report Ensino e Formação Profissional Dual (2014), pp.17, Figure 3 (Gráfico 3)
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profduoal.pdf

Figure A2.6 Trend in percentage of youth enrolled in secondary vocational education (vocational courses at upper secondary), public and private, in Portugal, (2000-2012)



Source: DGEEC (GEPE) (2000-2012) - Adapted from CNE Technical report Ensino e Formação Profissional Dual (2014), pp.18, Figure 4 (Gráfico 4)
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profduoal.pdf

Figure A2.7 Trend in percentage of youth enrolled in secondary vocational education (vocational courses at upper secondary), public and private, in Portugal, (2000-2012)



Source: DGEEC (GEPE) (2000-2012) - Adapted from CNE Technical report Ensino e Formação Profissional Dual (2014), pp.19, Figure 5 (Gráfico 5)

http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profduoal.pdf

Table A2.2 Number of Resource Centres for Inclusion (CRI - Centro de Recursos para a Inclusão), supported organizational units (UO – Unidades orgânicas apoiadas) and number of students with SEN covered, in Mainland Portugal, between 2009 and 2014

	CRI	UO	Students
--	-----	----	----------

2009/2010	132 (*)	637	13 211
2010/2011	129 (*)	637	14 099
2011/2012	109 (*)	551	12 868
2012/2013	107 (*)	558	13 696
2013/2014	89	571	15 041

Source: Adapted from CNE Estado de Educação (2013), pp.125, Table 3.2.1. (Tabela 3.2.1.) http://www.cnedu.pt/content/edicoes/estado_da_educacao/Estado-da-Educacao-2013-online-v4.pdf

Note: (*) Inclui projetos de parceria ao abrigo da Portaria nº 1102/97, de 3/11

Table A2.3 Number of Resource Centres for Inclusion (CRI - Centro de Recursos para a Inclusão), supported organizational units (UO – Unidades orgânicas apoiadas) and number of students with SEN covered, by NUTS 2 regions. 2013/2014

	CRI	UO	Students
<i>Mainland portugal</i>	89	571	15 041
<i>Alentejo</i>	14	67	2 015
<i>Algarve</i>	1	7	125
<i>Centro</i>	32	151	4 737
<i>Lisboa</i>	19	159	5 383
<i>Norte</i>	23	187	2 781

Source: Adapted from CNE Estado de Educação (2013), pp.125, Table 3.2.2. (Tabela 3.2.2.) http://www.cnedu.pt/content/edicoes/estado_da_educacao/Estado-da-Educacao-2013-online-v4.pdf

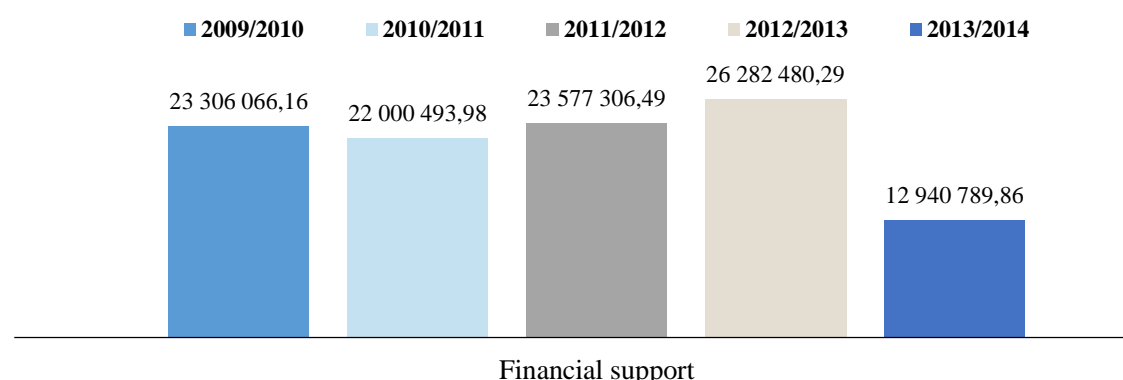
Note: (*) Inclui projetos de parceria ao abrigo da Portaria nº 1102/97, de 3/11

Table A2.4 Applicants and holders (No.) of financial support for special education, by NUTS 2 regions, between 2009 and 2014

	2009/2010		2010/2011		2011/2012		2012/2013		2013/2014	
	Applicants	Holders	Applicants	Holders	Applicants	Holders	Applicants	Holders	Applicants	Holders
<i>North</i>	7 024	6 386	5 679	5 192	6 882	6 108	7 271	6 329	2 326	2 173
<i>South (Algarve)</i>	39	39	27	26	27	27	31	30	42	40
<i>Center</i>	1 933	1 717	2 021	1 781	2 066	1 796	2 470	2 151	1 302	1 182
<i>Lisboa</i>	2 547	2 290	3 075	2 789	2 352	2 128	2 757	2 514	2 988	2 701
<i>South-central (Alentejo)</i>	321	302	313	297	291	280	486	456	507	464
Total	11 864	10 734	11 115	10 085	11 618	10 339	13 015	11 480	7 165	6 560

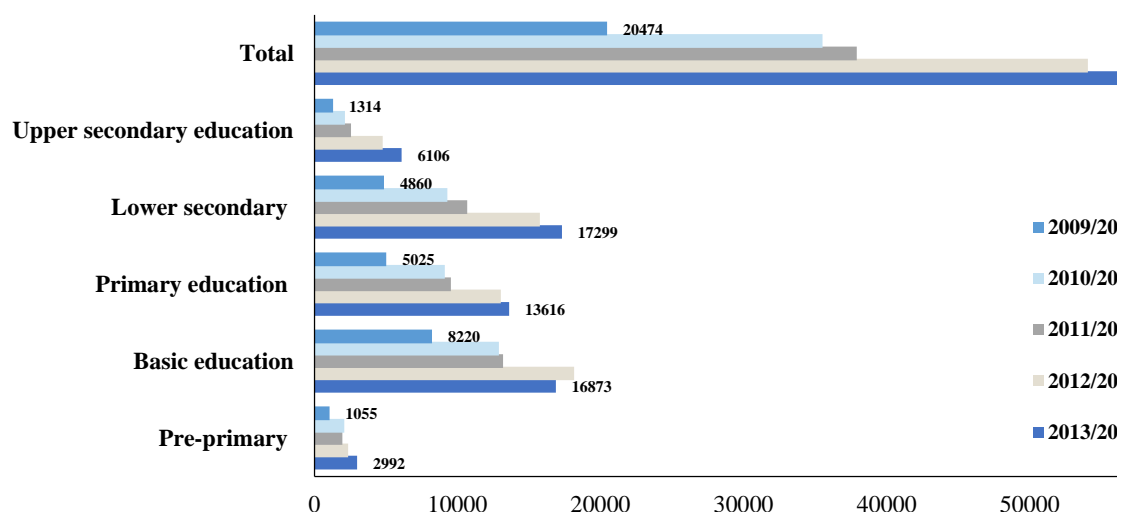
Source: Adapted from CNE Estado de Educação (2013), pp.129, Table 3.2.5 (Tabela 3.2.5) http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profducal.pdf

Figure A2.8 Financial support for special education (in EUR, mainland Portugal (2009-2014))



Source: Adapted from CNE Estado de Educação (2013), pp.129, Figure 3.2.4 (Figura 3.2.4)
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profducal.pdf

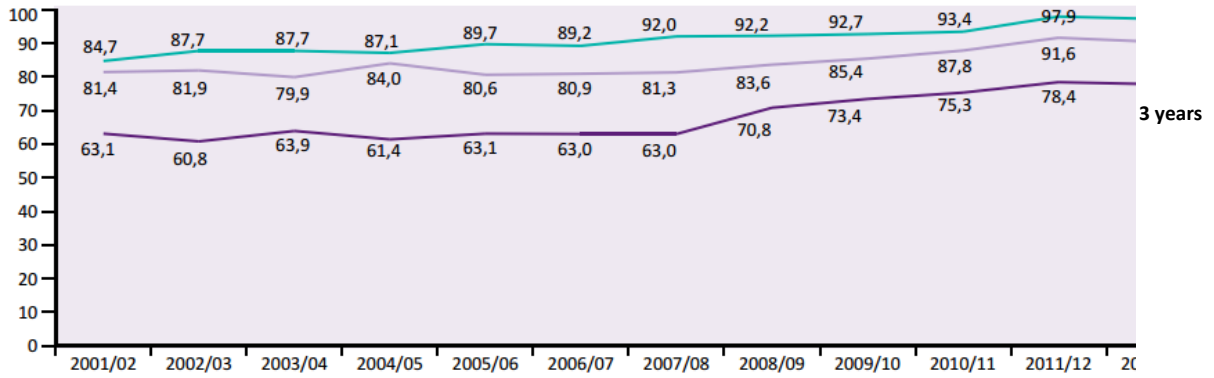
Figure A2.9 Evolution of the number of students with SEN, by cycles and levels of education, Mainland Portugal (2009-2014)



Source: DGESTE, 2014. Adapted from CNE Technical report Políticas Públicas de Educação Especial, pp.27, Table IV (Tabela IV).

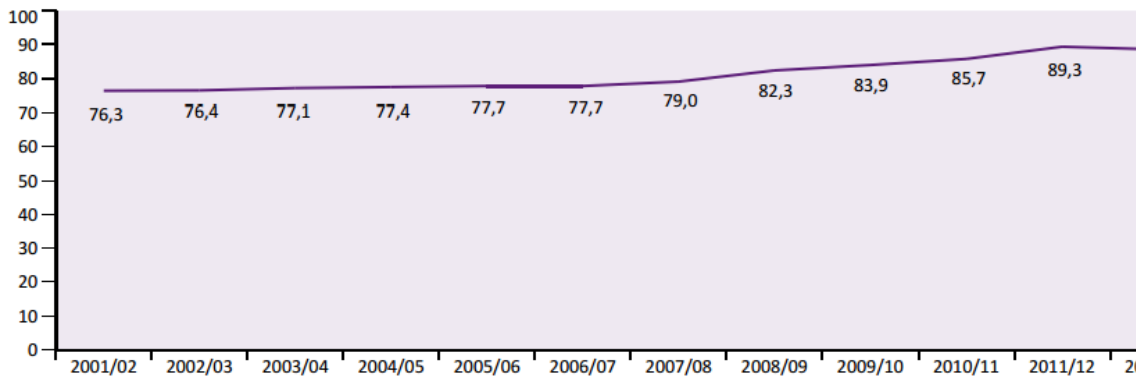
Figure A2.10 Evolution of pre-school enrollment rate (%) by age (5, 4 ad 3 years) Portugal

5 years
4 years



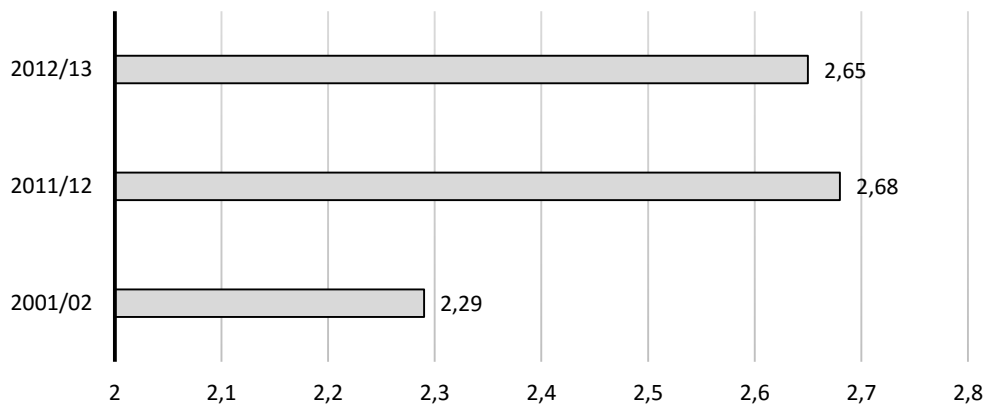
Source: Data and graph from CNE, Estado da Educação 2013, pp. 117, figures 3.1.4.

Figure A2.11 Evolution of the real rate of pre-school (%), in Portugal



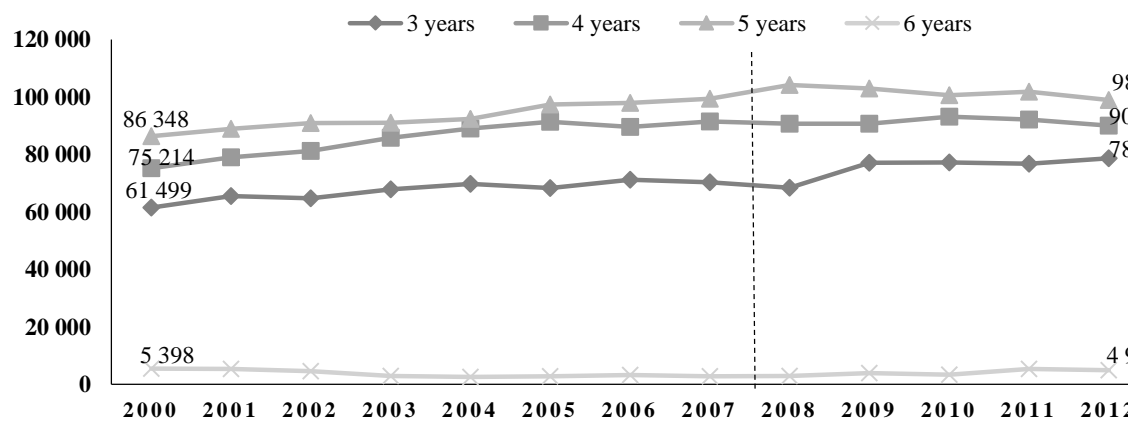
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 117, figures 3.1.5.

Figure A2.12 Evolution of the real rate of pre-school (%), in Portugal



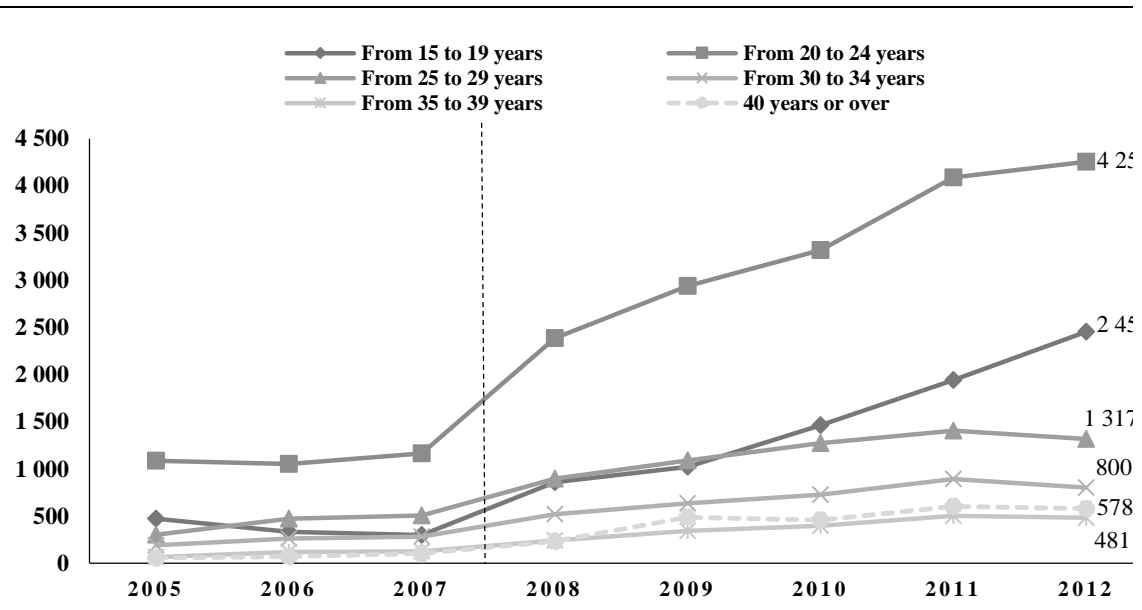
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 117, figures 3.1.6.

Figure A2.13 Participants in early education - as % of inhabitants of the corresponding age group, in Portugal, (2000-2012)



Source: Eurostat

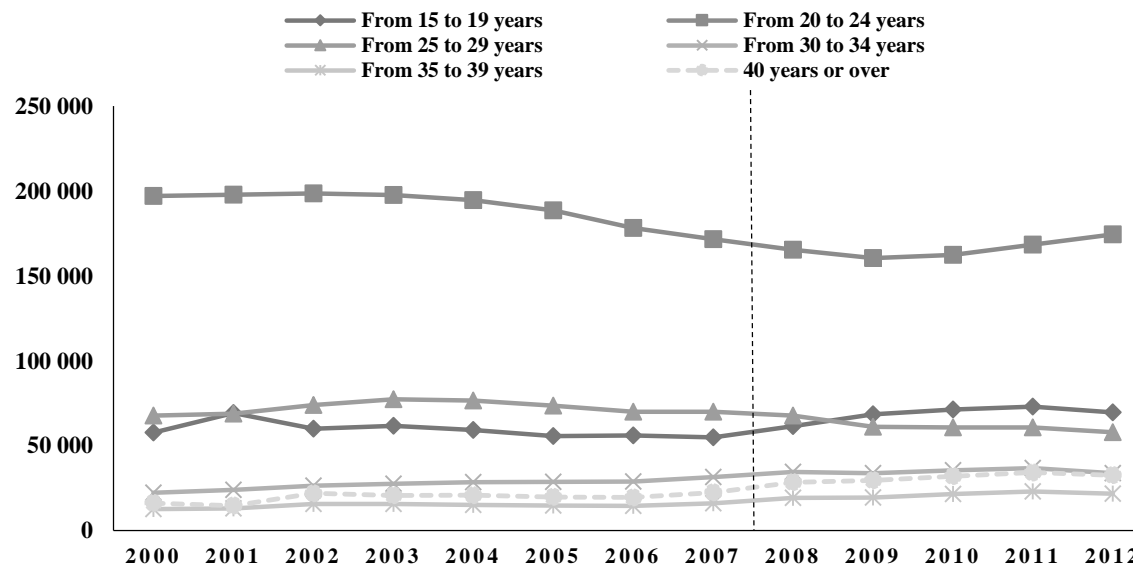
Figure A2.14 Participants post-secondary non-tertiary education- as % of inhabitants of the corresponding age group, in Portugal, (2005-2012)



Source: Eurostat

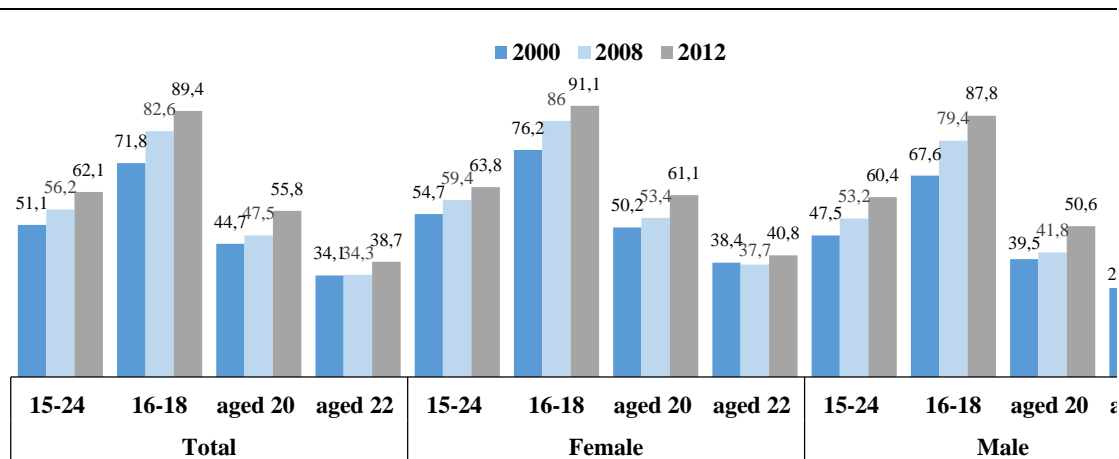
Note: Data before 2004 not available

Figure A2.15 Participants first and second stage of tertiary education- as % of inhabitants of the corresponding age group, in Portugal, (2000-2012)



Source: Eurostat

Figure A2.16 Participation/ Enrolment in education by sex age ranges, all ISCED (1-6) - as % of corresponding age population



Source: Eurostat

Table A2.5 Establishments (No.) Higher Education (organizational units)

	University		Polytechnic	
	Public	Private	Public	Private
Total	80	57	97	64
	137		161	

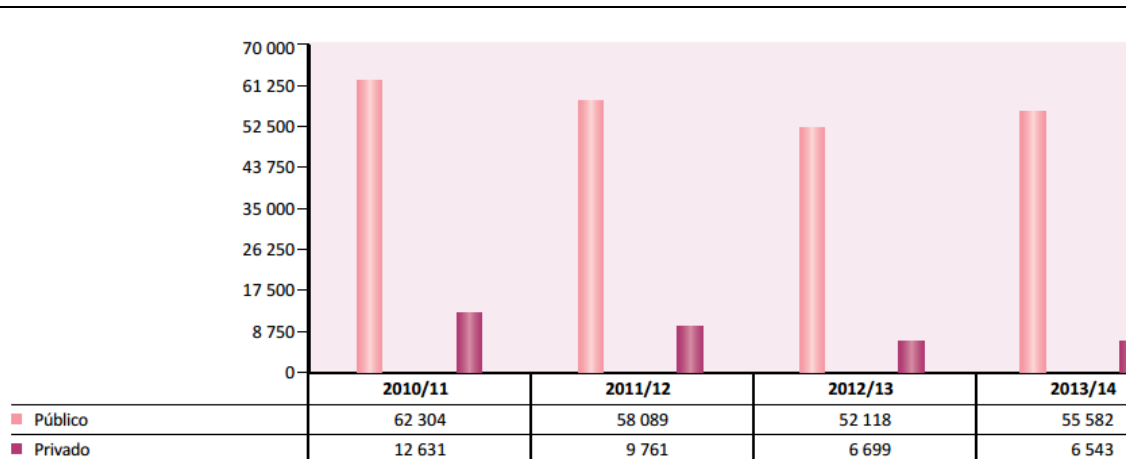
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 93, figures 2.3.2.

Table A2.6 Relationship between supply and demand in the public higher education in the 1st phase of tendering, by areas of education and training

Área de Educação e Formação	Vagas iniciais				Candidatos em 1ª opção				Matriculados		
	2011	2012	2013	Variação 2011-2013	2011	2012	2013	Variação 2011-2013	2011	2012	2013
Educação	1 753	1 468	1 227	- 30%	1 154	988	685	- 40,6%	1 468	1 264	958
Artes e Humanidades	5 772	5 753	5 859	+ 1,5%	5 041	4 862	4 629	- 8,2%	5 211	5 127	5 038
C. Sociais, Comércio e Direito	15 436	15 045	14 701	- 4,8%	14 136	14 726	14 012	- 0,9%	13 532	13 389	12 686
Ciências, Matemática e Informática	4 776	4 646	4 746	- 0,6%	3 120	3 495	3 310	+ 6,1%	4 101	4 035	3 983
Eng ^a , Ind. Transformadoras e Construção	12 651	12 423	12 038	- 4,8%	8 660	7 556	6 982	- 19,4%	10 261	8 820	8 293
Agricultura	1 186	1 250	1 357	+ 14,4%	803	802	616	- 23,3%	763	702	657
Saúde e Proteção Social	8 132	8 044	7 940	- 2,4%	10 860	9 739	7 594	- 30%	7 718	7 567	7 048
Serviços	3 764	3 619	3 518	- 6,5%	2 816	2 887	2 543	- 9,7%	3 105	2 990	2 757
Desconhecido ou não especificado	30	50	55	+ 83,3%	52	38	48	- 7,7%	30	50	55
Total	53 500	52 298	51 461	- 3,8%	46 642	45 093	40 419	- 13,3%	46 189	43 944	41 305

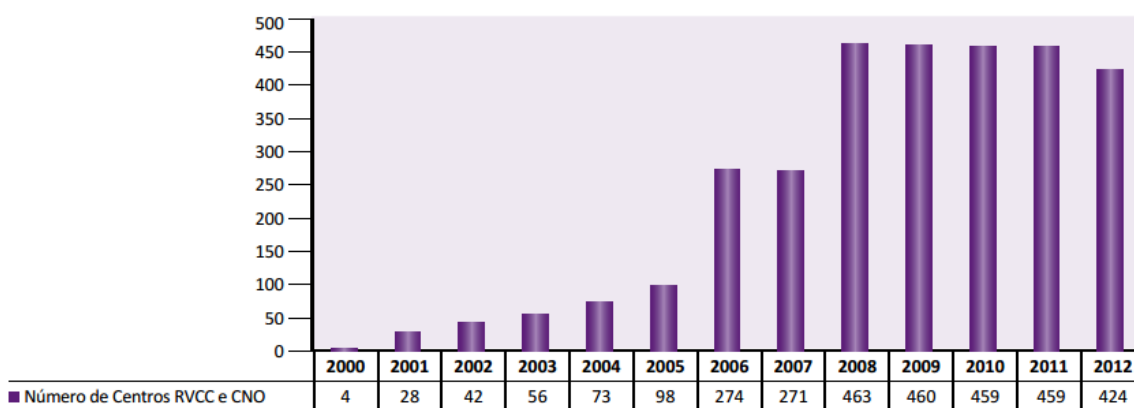
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 103, figures 2.3.11

Figure A2.17 Scholarship holders (No.) of Higher Education, in public (*público*) and private (*privado*) education.



Source: PORDATA, graph from CNE, Estado da Educação 2013, pp. 105, figures 2.3.3

Figure A2.18 Number of Centers for Recognition, Validation and Certification of Competences (RVCC) and centers of New Opportunities in Portugal, between 2000 and 2013



Source: ANQ, I.P, ANQEP graph from CNE, Estado da Educação 2013, pp. 157, figures 3.2.16

A3. Processes and mechanisms of monitoring and evaluating the educational system

Southern European countries have always assumed students' evaluation as a central issue, with a strong ranking and punitive load, while for the teachers and the organizations, a systematic and external evaluation has been scarcer (Veloso, Abrantes & Craveiro, 2011). Within this picture, schools' evaluation has followed a more formative, participatory, qualitative format, without punitive effects, justified by a need for social certification from the public institutions to its citizens. Nevertheless, it is easy to identify for the last 20 years multiple projects and experiences, underlying a notion of quality pointed by several international entities, but whose duration and scope have still not directly provided an « organizational assessment culture » in the schools and the system itself (Coelho, Sarrico, & Rosa, 2008, citados em Veloso, Abrantes & Craveiro, 2011). Discussing on the quality assessment for the Portuguese educational system implies a reference to the new legislation in terms of teachers' career status and the management of state schools (in Torres e Palhares 2009, citados em Veloso, Abrantes & Craveiro, 2011). In the new legislation, dimensions of professional hierarchy, discipline, and leadership emerge strengthened, reforming the democratic management of schools and the relationships between the teachers (in Veloso, Abrantes & Craveiro, 2011). The quality assurance of education in Portugal is framed in the basic principles of the educational system, pay rolled in the Constitution, the Basic Education Law, and the fundamental legislation on schools' evaluation. Within the Portuguese context, we refer to advices and recommendations from the National Education Council (CNE), the General Inspection for Education (IGE), as well as the general trend for the globalization of the educational systems, where international entities, such as the European Union (EU), the OCDE (Organization for Economic Co-operation Development) and the United Nations Educational, Scientific and Cultural Organization (UNESCO) have played their part through studies and recommendations. Moreover, we may say that it was from these international studies and models that the current external evaluation system was built in Portugal (Veloso, Abrantes & Craveiro, 2011; Lemos, 2014).

Briefly, the OCDE, the International Association for the Evaluation of Educational Achievement (IEA) and the European Commission (CE) have promoted international programs evaluating children's and youth's performance worldwide, in math's, sciences, reading and foreign languages. Since 1991, Portugal has participated in comparative studies on educational achievements (the International Assessment of

Educational Progress (IAEP I and II); IIEES --- International Indicators and Evaluation of Educational Systems; PISA – Program for International Students Assessment; TIMSS - Trends in International Mathematics and Science Study; PIRLS – Progress in International Reading Literacy Study; ESLC - European Survey on Language Competences; IECL; EAG - Education at a Glance, etc...). These participations revealed a major influence in the development of OCDE's instruments for examining national policies worldwide, focusing in the organization of each educational system and recommending specific public policies. The main aim has been to construct, compile, consolidate and disseminate international comparable indicators, through what later became the IIEES, for further uses on governance mechanisms, standards and benchmarks, and into detail of prescribing behavior and to influence convergence processes between countries.

The Portuguese participation in these international assessments has been coordinated by the national institutions responsible for monitoring education in Portugal – first the Institute for Educational Innovation (IIE) in 1989, replaced by the Office of Educational Assessment (GAVE) in 1997, and currently the Institute of Educational Assessment (IAVE I.P.) since 2012. The main steps for the Portuguese participation in this process can be identified in the following key moments:

- 1) In 1987, during the OCDE evaluation on Portuguese educational policies, whose main recommendation was on the need to invest more on the initial professional training for youth;

- 2) In 1989; 1990; 1991 – when large-scale surveys were applied to teenagers aged 14-15 years old, finishing basic education;

- 3) In 1991, with the first Portuguese participation in a comparative study named the IAEP II – on mathematics and science achievement of 9 and 13 years old students in 10 countries (co-coordinated by the Center of the Assessment of Educational Progress, a division of the Educational Testing Service, ETS, Princeton, New Jersey);

- 4) In 1995, with the participation in a comparative study named the Trends in International Mathematics and Science Study (TIMSS) – measuring trends in mathematics and science achievement for the pupils attending the fourth and eighth grades (co-coordinated by the International Study Center, Lynch School of Education in Boston College);

5) In 2000, with the first participation in the Program for International Student Assessment (PISA) – evaluating the education systems worldwide by testing the skills and knowledge on literacy in mathematics, science and reading of 15-year-old students;

6) In 2011, with the participation in the Evaluation and Monitoring of Elementary and Secondary Education, focusing in the performance of the education and training system, and intergenerational reproduction of families with low educational attainments.

In a first moment, the results of these international analysis, comparisons and national exams helped to highlight the Portuguese educational backwardness, indicating where to find low scores for students in Portuguese schools in terms of international comparison (above the OCDE' average). It has been pinpointed that the school variables with more impact in students' learning were the quality of the teachers, classroom practices, schools' leaderships taking into account inclusion and equality principles, as well as intercultural, citizenship, ethics and moral contents. Discussion on schools' management and organization has stressed the need to understand transparency and fairness within schools' decisions, families' participation and other external agents, and similarly to programs focusing on early school dropout prevention and monitoring on education progress and specific actions. Consequently, several and longitudinal recommendations and advices have promoted the approval of specific national programs and measures aiming a national monitoring of the educational system. The main aim has been issuing to fight exogenous factors against school failure and early school dropouts, on the need to adjust schedules and curricula to the individuals' skills and proficiencies, the labor market demands and relational and social citizenship skills. The main measures influenced by international assessments have been as follows:

1) In the school year 1988/89 – implementation of the Interministerial Program to Promote Educational Success (PIPSE), giving firstly priority to the 1st cycle of basic education;

2) In 1991, the Education for All Program (PEPT), successor of the PIPSE and aiming universal access to basic education (of nine years of schooling), to expand to later levels, while focusing in the outcomes of the actual enrollment rate for the 2nd and 3rd cycles of basic education, as well as on upper secondary education;

3) In 1996, the governmental improvement of the school library networks and implementation of the Educational Territories of Priority Education (TEIP) – reinforced in 2008, together with the Programa Mais Sucesso;

4) Between 1999 and 2003, two other programs were developed for youth aged 15 or older, who were early school leavers returning to school or youth risking or experiencing delinquent behavior – the Integrated Program for Education and Training (PIEF), and the Program for the Eradication of Child Labor (PETI). These programs focused on the need to adjust schedules and curricula to the individuals' skills and proficiencies, labor market demands and relational and social citizenship skills.

5) In 2004/05, introduction of two national exams at the end of the 3rd cycle of basic education;

6) Since 2005/2006, implementation of: a) the Action Plan for Mathematics (achieving more than 400 schools and school's clusters since 2009); b) the National Reading Plan (since 2006); c) Portuguese Second Language Program (PLNM, 2006); d) Mobile School Project for Itinerant Workers' Children (2005/06) for all levels of compulsory education;

7) Between 2005 and 2011, improving continuous training for primary school teachers in Portuguese and Mathematics, enterprised by the Ministry of Education, involving around 15.000 teachers (more than 50% working).

However, between 2010 and 2014, the decrease of public expenditure on education of EUR 2.1 billion, which equates to 24% of the budget, motivated the interruption of several of the aforementioned program and measures influenced by international evaluation and assessments, such as the Action Plan for Mathematics and the National Reading Plan, as well as the end of teaching peers PIEF, or the Mobile School Project.

Specifically thinking on the teachers' situation, due to OCDE recommendations that since 1986 onwards there was a significant recruitment of thousands of teachers while improving their professional status, with new referential for their training. And if teachers status firstly depended on their training and qualification (from pre-school to upper secondary education), their professionalization became more systematic only from the 1986 LBSE and the following measures in the 1989 – through new measures

consolidating the previous – achieving, in 2014, almost full professionalization of the 140.000 existing teachers. In 1990, one single teachers’ career and status was implemented, and in 1992 a first assessment to control the career progression non-tertiary education teachers (though cancelled from 1996 to 1998). From 2006, teachers are placed in schools on a pluriannual basis, and between 2010 and 2014 there has been a significant reduction on teachers’ figures (see section A2 in this report).

Concerning the schools’ organization and autonomy, during the 1970s this was based on small local units organizations, differentiated by educational level (pre-primary, primary, lower secondary and upper secondary education schools). Currently we have school clusters, expanded to provide full schooling to students during the 12 years of education (from 2000 onwards). The national network of schools is organized into groups, under the supervision of five Regional Educational Bodies on the Portuguese mainland and by two Regional Educational Bodies in the autonomous regions of Madeira and the Azores. Local authorities work collaboratively with the Ministry of Education and Science to provide transportation to all students attending compulsory education. In addition, a recent reorganization of the school network resulted in the construction of new school centres (“centros escolares”) to replace 1st cycle schools with a small number of students. This follows continuous recommendations from OCDE’s reports (from early 1960s, 1980s and 1990s), finding consensus among all democratically elected governments.

However, such re-organization hasn’t changed much in terms of schools’ autonomy. Though the 1960s OCDE’s first report on the Portuguese educational system called for the need to decentralization, meaning the need to give more autonomy to schools and more responsibility to local authorities, the educational policies have shown limited effects in changing significantly the centrality of top-down structure of power and decision. Currently, the work involved in the autonomy-building process and the establishment of contracts is coordinated, followed-up and evaluated on a nationwide and regional scale, by the Ministry of Education and Science’s competent authorities. The levels of competence and responsibility attributed at each stage are object of prior bargaining between the school, the Ministry of Education and Science, the Municipal Council and other interested parties. Public schools do not enjoy financial autonomy, and a system of financial control is conferred to the schools by allocating to them the total sum of funds so that the schools supervise and manage the incomes consigned to them.

Private schools falling under the tutelage of the Ministry of Education and Science regarding their pedagogic contents, benefit the same kind of status applied to private companies and administrations, working with the management principles and practices of private enterprises. Thus, exercising the freedom enjoyed by private schools is enshrined in the State's obligations and competences to: subsidize families when they exercise their rights and fulfil their duties in terms of their children's education; ratify the setting up of private education facilities and authorize them; monitor their regular functioning; provide technical and pedagogic assistance when requested; monitor the pedagogic and scientific suitability of their programs and study plans; provide aid to private education through contracts allocating subsidies and other tax and financial benefits, as well as monitor their correct application.

From 2009 onwards, the results of 2009 and 2012 PISA studies indicated that the general school performance in Portugal was converging to the OCDE's average, particularly for mathematics and science – decreasing the differences in at least in 30% from 2000-2012, while for reading skills, in about 18%. In addition, there was a decreasing on the number of students with the lowest performance – of about 5% less in general, and 8% less in reading, while increasing the numbers of those with highest performance (between 1% and 2% more in general; while more than 5% on mathematics). This was complemented with an increase of about 8% of students attending their modal age school year (10th grade) (and a reduction of those in the 7th and 8th grades). Nevertheless, PISA studies have continuously emphasized that the Portuguese case still indicates a close relation between PISA performance and students' retention (though also slightly decreasing).

In parallel to the international evaluations, national **Law n.º 31/2002 (of 20th December)**, defines the non-high education evaluation system (pre-school, basic and secondary education), based on auto-evaluation in all schools (clustered or not), and external evaluation – with multiple initiatives from private and public entities, not rarely related to the existing international evaluation assessments. The General Inspection for Education (IGE) has been one of its main actors. For instance the Program on Integrated Evaluation of Schools (1999-2002), followed by a second evaluation cycle occurring between 2006 and 2011 (including 43 schools' clusters and 57 single schools), a third cycle between 2008-2009 (including 172 schools' clusters and 101 single schools), and

since 2012 the new General Inspection for Education and Science (IGEC) evaluated more than 1107 schools and schools' clusters.

The national evaluation system has been focusing on students', teachers' and schools' performance, combining auto and external evaluation with international evaluation. Specifically for compulsory education (basic and secondary levels), tests for the end of each cycle and national exams evaluate the knowledge and competencies acquired by the students. The later are expected to work also as schools' quality indicator, curricular adjustment and for the implementation or adequacy of educational projects, thus, said to help in improving the system's quality. Previously, the process of teachers' performance evaluation was based on an auto-evaluation report, complemented with a critical reflection from other teachers and schools' management bodies – and mainly for those wishing to develop their career. In general, their final evaluation was, in average, satisfactory. The current evaluation on teachers' performance, elaborated by the Ministry of Education and Science, centered in a peers' evaluation, managed by the school, taking into consideration all functions and activities taken by the teachers (meaning pedagogic activities, and other services and active participation in school dynamics). This means that teachers are currently evaluated by the executive management of their schools and by the more experienced teachers coordinating each curriculum department.

The corresponding advices and recommendations of CNE from 2006-2011 evaluation focused in autonomy and participation issues, and can be divided in three moments. Firstly, **the Parecer n.º 5/2008 (of 13th June)** underscored the negative effects of school rankings but giving importance in continuing the schools' evaluation model and the different responsibility levels within the system – local, regional and national, while coordinating de auto-evaluation with the external one. Secondly, the CNE **Parecer n.º 3/2010 (of 9th June)**, recommending the extension and deepening of the consultation mechanisms, namely reinforcing the municipalities and parents participation. Finally, the **n.º 1/2011 CNE Recommendation (of 7th January)**, focusing on the three main aims of schools' external evaluations: the training of the school community; the regulation allowing elements that support schools' decisions; the participation of all elements in schools through a formative perspective that reinforces auto-evaluation. Last but not least, these recommendations raised the need to include private, cooperative and solidarity networks, in complement with external evaluation. In sum, focusing the attention on students as well as on the need to adapt the trajectories proposed by the system, they

define these priorities in close relationship with the local community, thus, calling different agents for their responsibilities while reinforcing also the need for social certification, efficient management of the existing resources and of the regulation mechanisms producing relevant information.

However, there seems to exist, still, an apparent homogenization of schools in the external evaluation reports, which contributes to the social construction of schools strongly dependent from policy measures and administrative choices for their management and organization. Such construction of a specific school model has shown potential effects in segregation schools accordingly to the evaluation results, when it should, on the contrary, contribute to improve the school activities, and learning practices (Veloso, Abrantes & Craveiro, 2011).

Indeed, in Lemos (2014) view, schools' external evaluations may lead to two essential functions: 1) retroactive information, meaning creating monitoring practices to adapt policies and the management of the pedagogic process; 2) social certifications, i.e., creating social trust in society. Lemos (2014) sustains that the current national evaluations have been the main changes of educational policies possible to be identified in the short term. As also expressed in Veloso, Abrantes & Craveiro (2011), Lemos also argues that current national examinations, being currently based on tests in the end of each cycle and national exams, give considerably more priority to the social impact of school certification, producing, thus, external and irrecoverable information. This is so because, the author continuous, such external evaluation does not allow to act upon the learning process of the students under evaluation (because it does not allow retroactive actions) and, consequently, being of no use to work on the need for school's equity. In this sense, these are mechanisms to promote social trust because certificating knowledge but not allowing to convert and transform the outcomes – exams do not improve education quality as they do not allow to act upon the conditions that promote their outcomes. And even if social trust may in some cases improve, this occurs at the cost of quality and equity mechanisms and needs. Thus, national evaluations have become, in this sense, less efficient in terms of resources management, and its consequences in terms of society transformations on equity. Differently, international evaluations have allowed mechanisms to improve the quality of the system, in terms of resources efficiency and access. Indeed, many of the improvement of equity conditions for education access have

resulted from OCDE pressures and the common international indicators (IIEES, through their studies and recommendations, though experiencing significant internal resistances).

B1. Equity

In general terms, by Equity we refer to effective, as opposed to formal equal educational opportunities. This implies focusing in dimensions of inclusion and fairness present in the educational system, i.e., population characteristics and socioeconomic context such as family and cultural background, or even ethnical background and disability - as factors that promote or hinder equal opportunities in the access and participation in education and in school results (for instance, at an internal level – students pathways and achievements; at an external level – social effects or outcomes from education – labor market structure, levels of employability, social participation and cohesion, levels of criminality) (in Valter Lemos, 2014).

The Portuguese educational system has always struggled with persistent structural problems (discussed at the previous section) such as the population low qualifications; considerable shares of youngest (aged more than 18 years old) with less than upper secondary attainment; high levels of school dropout; the low participation rates in tertiary education.

Some of these are traits of late schooling processes, explained by the Portuguese historical, political and social background specificities. For instance, societal factors such as the longest dictatorship (1926- 1974) reactive against schooling of the population in Portugal, the subsequent late democratization process of the educational system; and the related transition to an industrial society. In addition, labour market specificities, such as the remaining shares of lowest levels of economic productivity; persistent segments of precariousness in labour market (with high levels of unemployment and prevalent distinction well integrated individuals (males, white) against situations of temporary work and bottommost salaries (the youngest, females... migrants). In addition, socio-demographic specificities, as the recent demographic retraction combined with highest level of population longevity, pressuring both social protection and the educational systems, and deepening the schism between the qualification and social structures: while those within the working-age category show low qualifications and pressure the social system; the youngest entering the educational system and achieving the highest levels of educational attainment.

Several authors have discussed the levels of educational inequality in Portugal demonstrating that some external factors such as family background, social class and

regional inequalities (particularly between the coastal regions with higher population density and the inland with older and fewer population, and lower economic development), combined, internally, with the types of schools (private, public, residential area). The combination between all these factors has shown to be the determinant to individuals' academic careers. Researchers showed, thus, significantly high levels of selectivity in Portuguese schools, and besides the recovering of the last decades, the fragilities of the Portuguese system in terms of equity and quality are still easily identified. Further, these research lines also exposed traits of failure within certain social groups and categories, together with gender differences, particularly when adding analysing school failure (Abrantes, 2008, 2009; Sebastião, 2009; Seabra 2008, Diogo, 2008; Silva 2003, Capucha, 2009). Moreover, they tend to conclude that the levels of recovering from structural problems and achieve a better performance from educational system in promoting social mobility¹⁶ have not, though, been enough to diminish the social effect of the inequality at the educational level. School inequalities can be perceived at least at two levels: first – considering the permeability of school's context, which can contribute to reduce social inequalities; second – the reproduction effect, which contributes to a more segmented labour market and society.

The ways equity is compromised in the Portuguese educational system is basically linked with the system internal selectivity. This selectivity is reported, on one hand, within the presence of final exams at the end of each cycle, with great implications in the population that reaches the higher educational levels, meaning a selectivity inside the system; on the other hand, the consequences of the as scholar results, retention rates as well as on modal ages at cycles and attainment rates. The Portuguese educational system deals with failure and retention in a very 'natural way', and patterns of retention can be easily identify in each cycle (Abrantes, 2009). Finally, parents participation in schools context is said to have significant implications in promoting students' success (Salgado, 2011), when there are no adults' education concrete initiatives working properly currently, selectivity could have a bigger part in years to come. Indeed, Salgado has proved in her research, that scholar results of those whose parents were involved, at the time, in Novas Oportunidades actions, were becoming more successful, as the all concept

¹⁶ Evidences also show that education and qualification are still the main ways to social mobility and thus, for achieving better jobs and better positions in social structure.

of schooling inside families culture also suffer a changed – basic level become insufficiently both for parents and children.

Considering the importance of education in social transformation, the guaranty of the universality for the participation and access in education and vocational system, and the equal opportunities for success and scholar achievements, these sum up two main concerns in national education policy making. Results show both realities: (1) a recovering path, with some positive results (as exposed in the early section), and (2) crisis effects on the restriction of some educational areas (i.e. adults' education), the persistence or decline of some national structural problems that may deepening the social inequalities. How selective is our system?

Participation and Access

Once achieving the democratic stage, the Portuguese educational system had gone through several reforms and processes in order to enlarge its access and participation rates. The change of the Portuguese educational landscape occurred, in terms of law production and investments, in two stages. First, from 1980s to 2000s, reforms targeted the need to expand the system Not only in terms of human resources (in numbers and qualification) but also focusing on increasing school access for all who wanted to participate in education, through the redefinition of the process of education and training, the permeability and the expansion of school careers, and establishing connections between stages, investing mainly in basic and higher education.

Considering the equity in the access and participation, the enlargement of the compulsory school was one of the main key-moments¹⁷ for achieving the target – tracking ages. Vocational education has been perceived as a form of preventing the early school leaving and school failure (Figure A2.14).

Portuguese educational system is generally characterized as having a “late” tracking process, that occurs at the end of the third stage of basic education (last stage of lower secondary), and during the transition to the upper secondary -- where students with 15 years old (modal age) choose between a general pathway (humanistic and scientific courses) or a vocational and educational training pathway (in dual regime - the “Apprenticeship System” - and mainly in Vocational courses (CP)). The percentage of

¹⁷ First 9 years in 1986 and more recent (2009) to 12 years, see section A2.

students in secondary within the vocational options for upper secondary (indicator 2, excel document) had grown considerable between 2000-2012, and particularly since 2004. In 2012 these education modalities became closer to general courses participation, reaching 43 % of all students enrolled at secondary (ISCED 3) against 56% enrolled in general paths. This evolution shows the progressive weight of the vocational areas in Portugal, a matter receiving particular attention in policy making domain since the Lisbon Strategy.

Considering the access to the tertiary education as a priority, the Portuguese educational system shows some level of “permeability” between these two educational paths, allowing students from VET courses to move on to tertiary education, namely through the Specialization Technologic Courses (upper secondary) or the Vocational Courses (at upper secondary, providing a level 4 of qualification). This means, that a more selectivity at the basic and lower secondary, once vocational options intend to prevent the school dropout and scholar failure.

In this sense, and because the educational system is affected by school failure and considerable retention rates, some scholar modalities present at the current VET system are seen as options to promote the success among those students who are in preannounced paths of scholar dropout, or even students with specific needs (e.g. students experiencing situations of social exclusion and particular familiar backgrounds). Recent educational reports (Estado da Educação, 2013; 2014) refer school success increased in last 20 years and this has been evident for basic level and secondary level and clearly due to the introduction of the vocational areas.

This means further that different curricular pathways leading to different stages of further education can be detected in much earliest phases. Specifically the ETC at the basic stage (levels 1, 2, and 3 of these courses) for those aged 15 or more (in some specific cases, less than 15) with retention levels and difficulties in completing compulsory school - functioning as a form of “tracking”. I.e. by means of the ETC (levels 1, 2 or 3) and the levels of certification, can lead students to the secondary ETC (levels 4,5,6 and 7) in some cases, or to the secondary “regular” way, in other cases, which in the ends, represents almost two different scholar modalities, tracing two different pathways.

Entering other school programmes and modalities developed to respond to school failure, like Alternative Curriculum Paths, can also restrict scholar pathways, once it

becomes more difficult to access the general courses considered to be the main path to access to tertiary education.

In fact, considering the last legislation since 2011, we assist to a progressive return to the dual system (academic and vocational) from the third cycle of basic public schools (5th to 9th grades, i.e., from 10 years old), -- abolishing the unification of the system until the age of 15 (dating from 1974). Currently, the last two stages of compulsory education, namely the 3rd cycle of basic education and upper secondary education, include dual certification and courses geared towards further study (referring to the National Qualifications Catalogue, the National Qualifications System (NQS), and the National Qualifications System Training Entity Network, the National Skills RVC System and the National Qualifications System for Vocational Training). The aim is to have an earlier tracking base present in the Portuguese system as a way of preventing school drop-out, more in resemblance with the Germany dual system.

In this sense, we consider that currently there's an additional level of selectivity present in Portuguese educational system, which will be more problematic with the deepening of the dualization regime which may compromise equity of the access on education. This new scenario may turn even more difficult for students to access the pathways that can lead them to tertiary courses or courses of level 5 certification.

Adult's education initiatives

Adults Education stays as one of the most problematic indicators analysed in terms of participation in education and equity analysis. Equity is compromised here at least at two levels: Firstly, because there were recent severe and dramatic 'cuts' in this domain, with the closure of an entire programme dedicated to solve the deficit of Portuguese qualifications (NO)¹⁸. This compromised adults education and training offers in a long term, leaving thousands of people with no valid educational options; Secondly, acknowledging that parents' involvement and participation in education has consequent benefits on children's results, once there are no viable adults' education options, this means that early school success and forms of preventing schools inequalities and social effects are also being compromised.

Adults' qualification and education had a clear development between 2000 and 2013, increasing participating rates and the level of certification. Since 2011's measures,

¹⁸ Already explore in the section A2 of the current report.

this growth was inverted -- less adults aged 25 and 64 were involved in education actions (11,6% at 2011 and 9,9% in 2013). More evident, if we analyse the number of students who had completed the secondary level by educational modality, we clearly see that the options concerning the programme 'NO' had a drastic decline: in 2008/2009, 44.916 adults had completed secondary within the RVCC system (explained in section A2), while in 2013 these were only 10.353 cases of success. On the contrary, between 2012 and 2013, we observe a clear shift in policy making and in its priorities concerning this area. For instance, with the intensification of some old educational tools for adults (e.g. 'recurrent education') even if constitutes an option, has shown in an earlier stage to be clearly insufficient in solving the offer's problem and of adult's qualification. Today has increased again in 2013 and for the first time since 2006 (Educação em Números, 2014, Excel document page 4; table 2).

Another important factor is that NO programme and adults education options had also an important role for younger generation's education, particularly for those aged 25-34 who had problems in ending compulsory education (the age group most involved in adults initiatives reaching almost 20% in 2011 and decreasing to 17% at 2013). As it was earlier stated in this report, these ages are characterized both by higher qualifications attainment, but also prominent percentages of people having only the basic education completed. In 2012, OCDE recommended in the "Ongoing Growth" report, that Portugal should expand NO programme, being of major importance for adults and younger generations, and this was not taken into consideration.

School population diversity – ethnical background, immigrants and special education

In what concerns specific segments of pupils, the available information is not totally precise. For instance, we can assume that the gipsy community has a representation in all Portuguese schools but their presence is bigger in TEIP's schools. 'TEIP'- 'Educational Territories of Priority Education' – a programme that works with the diversity of social and ethnical groups within specific signalized schools, promoting actions for inclusion and school success -- considered to be one of the most successful ones working on matters of social inequalities and promoting equity for those students with more probabilities of failure and drop-out. Their last global report (TEIP, 2011) referred that at least 10% of the population in these schools (about 140 schools) corresponded to the ethnical group of gipsies. Furthermore, the pronounced representation of immigrants in Portugal, leads us

to the assumption of their equal or higher presence in the Portuguese schools – particular PALOP’s, Brazilians, Eastern Countries communities.¹⁹ Several education studies approaching social inequalities and school results, focus on immigrants and immigrant’s descents, precisely for those whose failure and drop-out are most prominent (Seabra, 2008; Machado, Matias, Leal 2005; Roldão , forthcoming).

One of the facts changing schools and its population was the development of the “Inclusion Education” agenda, between 2006 and 2010. Inclusion was the major aim with the real integration of children with Special educational needs in regular Portuguese schools and regular classes (see section A2). Although this serves as an important sector for equity purposes and promotion in Portuguese educational landscape, the last political measures had implications both on special education state funding, which had decreased, and also in terms of its legislation, where some regression path has to be taken into consideration. The earlier institutionalization of these segments- integrating these children in specific unites that are not covered by Portuguese school’s network - again being strengthened in political discourse. Several parents’ associations of children with disability have been contesting these measures and the lack of human resources allocate in this sector – for instance, “Pais em Rede” (Parent’s Network) and “Associações de pais para a inclusão” (parents associations for inclusion), launching a petition in late October to repeal some of the latest regulations.

The total number of students signalised with special need increased in all cycles, from 54.083 in 2012/2013 to 56.886 in 2013/2014. However, this growth is proving not to be a positive sign when human resources are suffering a considerable penalization: general decrease of teachers – from 4.864 in 2010 to 4.742 in 2013; teachers specialized in deafness and blindness disabilities, from 158 to 44 and 90 to 52 respectively, in the same years. Finally, the decrease of the specialized unities integrated in schools – CRI (Centers for Inclusion Resources) – from 132 unities reported at 2009/2010 to 89 at 2013/2014, and Organic Unities (UO) from 637 to 571 in the same years (Estado da Educação, 2013).

Taking into consideration these facts, we can conclude that a shift in educational paradigm is taking course, where the austerity context and financial retraction are not

¹⁹ In 2013, Foreign Nationals Service reported 401.320 immigrants residents in Portugal – more expressive: Brazilians, Cape Verdeans and Angolans (41,9% in total); Ukrainians; Romanians; Chinese. 10,3% of all immigrants have ages between 0-14 years old.

ultimate factors explaining the late measures in education. Clearly this is compromising equity and levels of inclusion in Portuguese schools.

ATTAINMENT AND SCHOOLS RESULTS – LEVELS OF SUCCESS AND FAILURE

Describing the population attainment: indicators 4, 5, 6 excel document

At least three indicators summarize Portuguese population's qualification and patterns of schooling, previously discussed, giving also a general idea on school success by means of the completion rates. In this sense, reporting the secondary attainment, and knowing the objectives concerning this matter on Horizon 2020, this level still presents a clear deficit in the Portuguese society: only 21,9% of people aged 15-64 had completed secondary education in 2012, more 7,3 pp since 2002. On the one hand, younger age groups (20-24 years), are those where the highest rates can be found, specifically 52,1% in 2012, and on the other hand, older groups show the lowest rates: 13,6% for those aged 45-54, and 8,7 for those aged 55-64. The percentage of total people below secondary attainment is in general prominent: 62,4%. (Figure B1.4, Figure B1.5, Figure B1.6

These numbers show the importance of viable options for qualifying Portuguese population. Concerning the tertiary education, 25-34 corresponds to the group with highest rates: 28,3%, however remaining the lowest proportion when comparing with other European countries.

Retention rates indicator 7 excel document

Early school dropout and failure are considered the main problems affecting our educational system. Despite several recommendations from OCDE and other educational agencies to end with some measures linked with the intensification of these phenomena, the persistence of some 'pedagogical' instruments like retention, are still shaping Portugal's levels of success. "Grade Retention in Schools in Europe" from Eurydice in

2009, reported Portugal as one of the countries with the highest rates in Europe (more than 30%), corroborated by other studies: at 2006, Portugal had one of the highest grade retention in OCDE's context, with prominent evidences for boys, immigrants and public schools (Conboy, "Retention and Science Performance in Portugal" 2010)

Some Portuguese authors (Abrantes, 2008, 2009; Alvares, 2014; Ferrão, 2014) demonstrated that retention does not promote success, constituting instead a factor predicting the worsening of early school leaving. Maria Álvares in her a research on Early School Leaving in Portugal (CIES, 2014) has recently demonstrated that retention and school failure are clearly the main predictors of school dropping out in our country. Maria Ferrão (2014) has referred in her recent study on PISA 2012 results, the main individual and collective negative impacts from retention, such as: the inducement of early school leaving; the fostering of negative self-concept; the congestion of the Educational System and the waste of resources. Some of the findings with Pisa results on retention were described by the author: 34.3% of students say they have been retained at least a year throughout their school career, being the 3rd highest rate in the EU-26; 23,3% of students say they have been retained at least one year in the initial phase of their trajectory (ISCED 1) - the highest rate in the EU-26. Having related these facts, and constructing a regression model to predict retentions rates, she shows that retention is variable concerning gender, the socio-economic group and type of school, as:

- The rate of retention possibilities is 1.8 times higher in the male group compared with women
- The reason of not being retained possibilities increases 1.6 times for each additional unit in the self-concept scale in mathematics
- The ratio of possibilities of not to being retained increases 1.4 times for each additional unit in the socioeconomic level of the student
- The reason possibilities of not being retained triples for each additional unit in school composition by socioeconomic status
- The fixed effects associated with school type (Private vs. Public) is no longer statistically different from zero when the statistical model includes the socio-economic composition of variable school.

Analysing retention rates (indicator 7 on excel document) we verify that rates increased with the advance of cycles, and following Pedro Abrantes findings in 2008; 2009, this tends to be more expressive on the first year of each cycle. Nevertheless, the global rates are: 3,3 % in 2011 for the first cycle of basic; 7,4% in 2012 for second cycle of basic; 13,3% in 2011 for third cycle of basic. In all these cases, grade retention show a decrease comparing with 2000. Secondary education presents the highest rates -- 20,8% in 2011 with 34,3 % considering the last year in this cycle (12th year) -- increased rates considering the previous years (19,3% in 2010). The main changes occurred since 2006, concomitantly with the increase of certification offer, professional courses and several action plans implemented focusing on school success promotion (Action Plans for Mathematics and Portuguese, the continuous of strategic programmes like TEIP and even the NO programme with the promotion of qualification of the population). Nevertheless, such analysis for Portugal clearly indicates a pattern of retention almost “naturalized” and accepted in schools.

In a recent study, Seabra, Ávila and Castro (2014, forthcoming), showed that school performance in Portuguese schools can be significantly associated to pupils’ background, mainly social background but also immigrant. Using recent data from the school year 2008/09, where it is possible to distinguish immigrant background for all cycles of compulsory education by students’ nationality only, they’ve showed that:

- 1) those of foreign nationality are considerably more present among students attending professional training compared to those of Portuguese nationality (14,5% compared to 9,6%), particularly if their nationality is Santomense (35,7%), Cape Verdeans (32,4%) or Angolan (19,7%) or Guinean (14,1%);
- 2) Foreign pupils showed lower transition rates between cycles of compulsory education, a gap increasing with the continuation of studies -- from 96,6% for Portuguese and 92,2% for foreigners in primary education; to 93% and 84,5% respectively during 2nd cycle of basic education; to 86,8% and 75,9% respectively during the 3rd cycle of basic education; to 79,7% and 61,5% during secondary education. Again, this gap was always more significant if students were Cape Verdean, Guinean, Santomense or Angolan nationality;
- 3) However, transition rates show significantly lower differences when comparing students nationality in professional training and education, for both the end of basic education and secondary education;

- 4) From their own sample, the authors concluded still that the main effect of social origins in students performance, particularly for mothers' educational attainment, though data also indicated that some immigrant origins explained more than others students' performance (for instance, negatively for those of Cape Verdean origins, while positively for those of Brazilian origins).

PISA Results indicator 7.1 and ESL Rate - indicator 8

Global PISA results are putting Portugal in a path of convergence once considering OCDE's averages, and even targeting it at the level of other European countries - like Sweden with clear declines in late PISA's evaluations. We observe a clear tendency of increasing with better performance at all areas evaluated, particularly since 2009– Reading – although registering a slightly decrease between 2009 and 2012, globally the results increased in 18 points (with score of 488 at 2012, OCDE of 498); Maths – results increased in 33 points (scores of 487 at 2012, OCDE's average with 494 – this average is progressively decreasing); and finally, Science, with an increase of 30 points (scores of 489, and OCDE of 501). Other general analyzes allows to verify a decreasing on the numbers of students with lowest performance and an increasing of those with highest performance ([See indicator 7.1 PISA results, Excel Document](#)).

Concerning equity, PISA results in 2012 in Math's, also shown that the Socioeconomic Status continues to have weight on school performance. Considering, for instance, southern Europe, Portugal is still the one with the greatest inequality level: students from the last quartile had a score of 441 while students from the first quartile 548 (indicator 7.1 PISA results). Differences are also considerable when analyzing the association with social background and immigrant origins: even-though the distance in results have diminishing since 2003, at 2012 is still possible to see that non-immigrants have better scored results: 460, while first immigrant's generation had 405 and second immigrant's generation had 410.

The early School Leaving has also been progressively decreasing, demonstrating the effort of Portugal to reach the targets imposed by the 2020 agenda (10%). However, still maintaining one of the highest rates of Europe: 20% against the 11.4% registered in European's average. The most affected are men (25.2%) and employees (10.5%). The level of policies, the dual certification offers, the professional courses and TEIP program, altogether have provided important prevention measures to school dropout,

notwithstanding, and since this phenomena differs at regional level (being a more visible reality in certain contexts) are necessary more targeted measures and greater involvement of local communities and families (Estado da Educação, 2013; Alvares 2014)

Strategies for promoting success and equity

Specific national/political programs for improving scholar performance and the (reinforcement of) international assessments influence

Having awareness of the Portuguese backwardness in educational results and performance, policies were implemented during the last 20 years to improve educational outcomes at an international plan (see also section A3 for this matter). As said before, between 2000 and 2010 we registered, in terms of policy making, a path marked by continuity in education when measures targeted both school massive participation and school success. This continuity allowed Portugal to recover indicators such as PISA results or ESL rates, only interrupted with the outcome of the crisis, the package of austerity measures and the shift in policy objectives and orientation. Among the several specific programs in the period considered, and particularly since 2006, we can summarize (also check section A3): National Reading Plan; Portuguese Second Language program; Mobile School project for itinerant workers; and TEIP. Of all the mentioned programs, only TEIP remains as an educational offer and measure for promoting success as it is still functioning since 1996. The decrease of public expenditure on education of EUR 2.1 billion, which equates to 24% of the budget, along with political main changes (represent in depreciation of public school and equity models), motivated the interruption of all other programs and measures.

TEIP

The TEIP- Educational Territories of Priority Intervention is in its Third Program form (TEIP3) established by Normative Dispatch nº20/2012 03 October. In its 1st phase, TEIP Program was developed only in 35 schools groups and the target was to implement the program in 100 schools group. The main action was reinforcing the schools capacity to deal with particularly difficult neighborhoods. The next TEIP2 program, created by No. 147-B / ME / 96 of 1 August, aimed to provide specific responses to the needs and expectations of students and communities as well, and it has been co-funded by European Social Fund (like the third generation program). With the third program, more schools were involved, corresponding nowadays to a total of 137 schools across 5 Regional areas:

49 in the North, 11 in the center, 49 in Lisbon and Tagus Valley, Alentejo 17 and 11 in the Algarve. The central objectives of TEIP3 Program have been:

- To Improve the quality of learning and the educational success of students;
- To fight indiscipline, early school leaving and absenteeism;
- To create conditions for educational guidance and qualified transition from school to working life;
- To promote coordination actions between schools, social partners and training institutions present in the educational area;

According to the last report (2010, TEIP2), the success of the program is seen in better scholar results, students and professionals' satisfaction, the increase of familiar-school contact, and the inclusion of community in school's activities. As well, the decreased of absenteeism, indiscipline and increase in success rates, overcoming the national rates in same cases.

Educational Expenditure /Funding

Social scholar support

Considering public educational expenditure and equity, social scholar support revels to be one of the most important indicators.

On one hand, it is linked to equity and equality of opportunities, guarantying the universal access to education by providing monetary aid to those in need, school supplies, scholarships and loans. With the basic educational legislation in 1986, a set of educational support and complements for families were designed to support families with higher economic deficits. However, and once it is linked with educational state funding, it has not been applied regularly. The year of 2009 marks an improvement with the decree-law 55/2009 of 2 March, when the number of beneficiaries of Social Support (Portuguese Ação Social Escolar – ASE) were extended and a direct correspondence of monetary aiding along with family's state allowances was established. This allowed the increase of beneficiaries from 208,488 in 2007/2008 to 500,096 in 2009/2010. During this period, the level of available resources, such as school books, meals, and other school supplies, also increased. (Alvares, 2014; Rodrigues, 2010) Taking into account the coverage of

social Support, and their designated levels of aiding (A or B)²⁰ for the 2nd cycle of basic education, the number of students covered has doubled from 237,257 in 2007/2008 to 527,576 in 2008/2009. No recent figures are available, although plenty news in the media point to a strong decrease after 2011/2012. On the other hand, given the universal aspect comprising the Portuguese educational system, school social support does not concerns only to specific segments of monetary aiding, ensuring in addition the universality of school transport, school canteens, the distribution of ‘school milk’ in basic schools, and merit scholarships.

Data have shown an increase in expenditure considering Social Support, between the years of 2000 ad 2010 – from 2,3 % to 5,2%. The tertiary education remained with highest level of expenditure: 16,6% in 2010, where scholarships are the main object (Figure B1.1). However, national data indicate that the numbers of students benefiting from social support measures decreased from 329,454 in 2011/2012 to 310,481 in 2013/2014. It is argued that demographic retraction has its implication, but knowing that social monetary aiding in education is related to families incomes, and that several restructures were made in income earners and IRS contribution levels, we can conclude that many students have lost their eligibility conditions, independently from their actual need.

Levels and dynamics in State Educational Expenditure

The level of expenditure indicates the importance of education in the political priorities of the governments and the impacts of the ongoing Crisis. In the last years, its dynamics reveal the sectors considered to be of most priority for monetary resources allocations, and each were not. And though the global expenditure decreased in last years (see section A1), this occurred mainly for human resources restructuring and salaries cuts, and establishing priorities in education in terms of its efficiency, meaning here that specific education programmes and options were more significantly penalized. National data from the national report of State of Education demonstrates that:

²⁰ Level A and B of school aiding corresponds to levels 1 and 2 of “Child Benefit” respectively, a state allowance provided by Social Security (solidarity sub-system) to families with children and low incomes. The 2 levels comprise:
Category A- allowance for books, school supplies and lunch (free).
Category B - half of the value given to level A.

- The level of expenditure in pre-schooling increased – from 299 million in 2001 to 581 million in 2013; this indicator had increased until 2010 (580 million) and has decreased in 2012 (517 million).
- The level of expenditure in Basic and secondary education also increased – from 4,406 million to 4,592 million, even with a decreased registered in the first cycle – 824 million in 2013. The maximum level of expenditure in both cycles is reached in 2009 (5034 million) and has decreased ever since.
- The expenditure in vocational areas had increased considerable – from 43 million in 2001 to 496 million in 2013. The maximum of expenditure is reached in 2010 (551 million) and has decreased ever since.
- An apparent increase in special education – from 136 million in 2001 to 219 in 2013. In this case, the 234 million attained by 2011 decreased to 219 register at 2013.
- An apparent increase in adults' education level of state expenditure - from 25 million to 43 million in 2013. In 2010 this level of expenditure were situated in 55 million, decreasing ever since.
- The level of expenditure by student between 2000 and 2009, stays in a regular pattern, registering an increase – from 25,8% to 28,8%. Nevertheless the available data are not coincident with the years where expenditure decreasing were most evident (Figure B1.2).
- The level of expenditure state direct funds to Tertiary has decreased from 1067 million in 2005, to 990 million in 2013 (it reaches the maximum level in 2010, 1299 million).

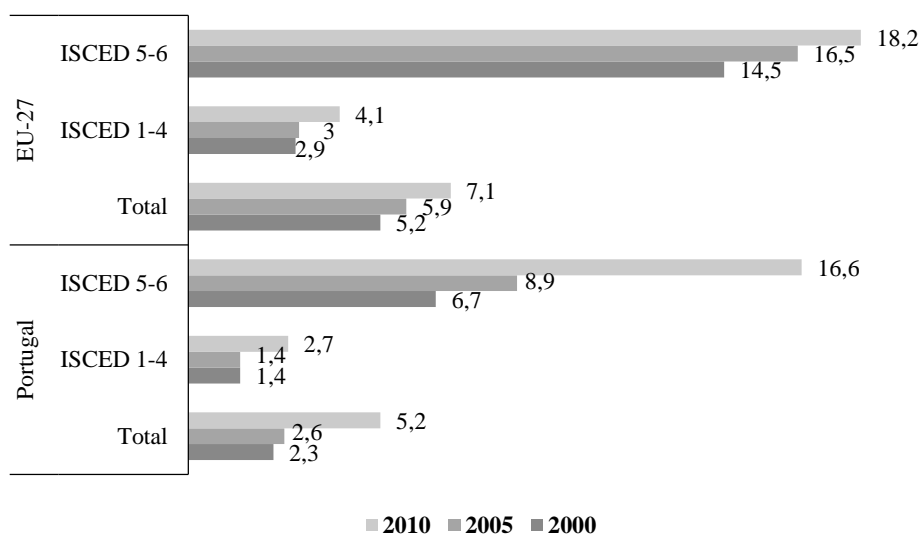
OCDE report in 2009, based on PISA's results, referred that the Portuguese educational system was among the most expensive ones in OCDE's context, but also one of the most selective, with shares of considerable failure and having the socioeconomic effected compromising scholar results. The question remains: how to guaranty efficiency without compromising equity? Without affecting specific segments of school population and without compromising international targets?

We can conclude that:

- Equity is compromised not only by budgetary matters but also by specific choices in policy-making: the end of educational programmes, for instance; the cuts in special education resources.
- Scholar success is clearly linked to social background, affecting equity promotion. PISA's results continue to indicate that the Socioeconomic Status weights considerably on school performance, and among southern European countries, Portugal shows the greatest inequalities.
- The persistence of a selective educational system with considerable retention rates and introduction of more exams;
- The current intensification of vocational areas and Dual system, observed with the considerable increase in levels of expenditure but also the recent proposals for introducing vocational areas at the end of the second cycle of basic;
- Compromising the equity by diminishing the "inclusion" of certain segments, like we have seen with special education;
- No valid solutions in order to solve Portuguese backwardness in what concerns the structure of qualifications

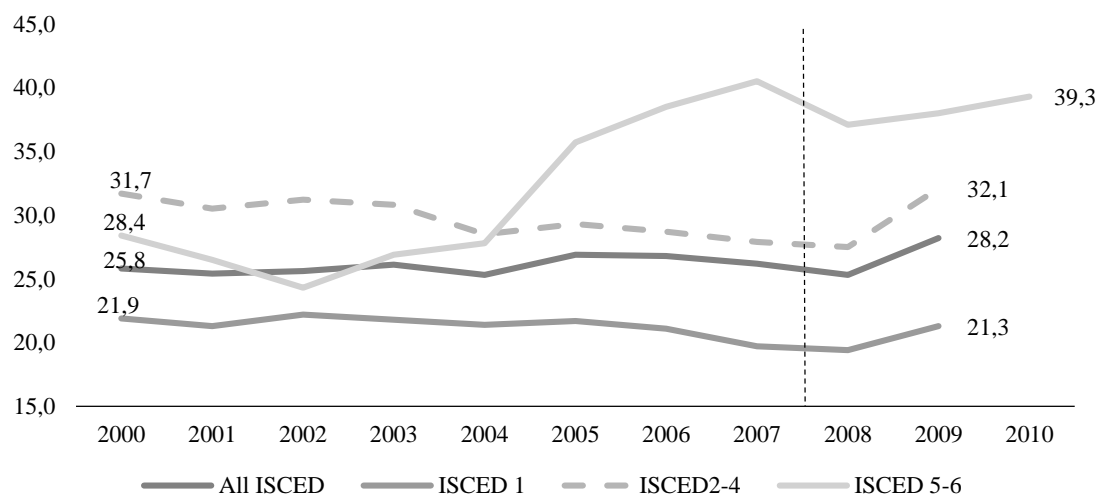
Annexes

Figure B1.1 - Financial aid to pupils as % of total public expenditure on education, by ISCED level, in Portugal and EU-27 (2000-2010)



Source: Eurostat

Figure B1.2 - Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents, in Portugal (2000-2010)



Source: Eurostat

Note: Data for 2010 not available for ISCED 1 and ISCED 2-4

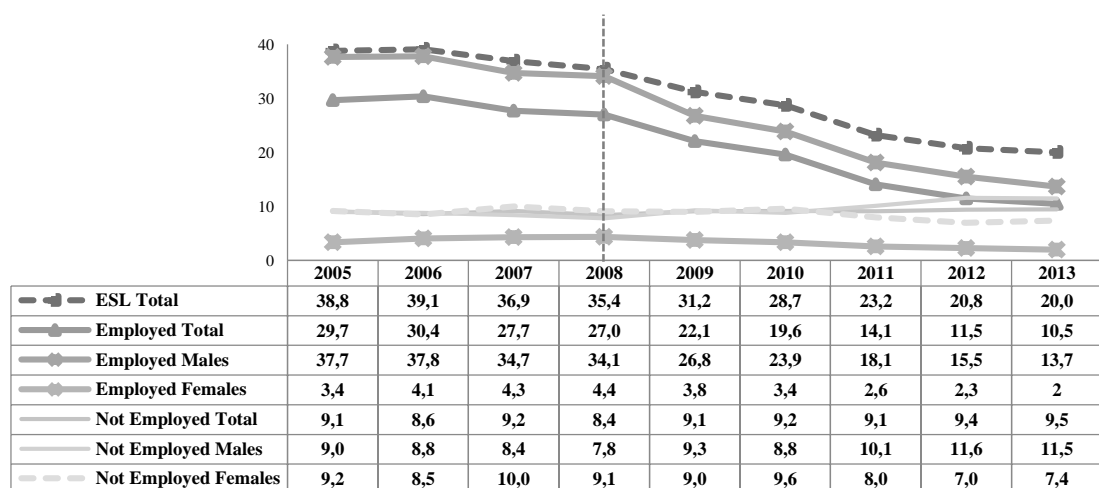
Table B1.1 - Pre-School Enrolment - Pre-primary education (level 0), % in relation to the same age total population and in relation to the same age total population

		% IN RELATION TO THE SAME AGE TOTAL POPULATION					
		4 years		5 years		6 years	
		2000	2012	2000	2012	2000	2012
TOTAL		71,1	91,6	80,7	97,9	4,8	4,7
MALES		69,4	93,4	78,9	99,4	5,3	5,5
FEMALES		72,9	89,7	82,5	96,3	4,3	3,8

		% In relation to total students enrolled					
		4 years		5 years		6-7 years	
		2000	2012	2000	2012	2000	2012
MALES		50,7	52,2	50,6	51,8	56,5	60,2
FEMALES		49,3	47,8	49,4	48,2	43,5	39,8

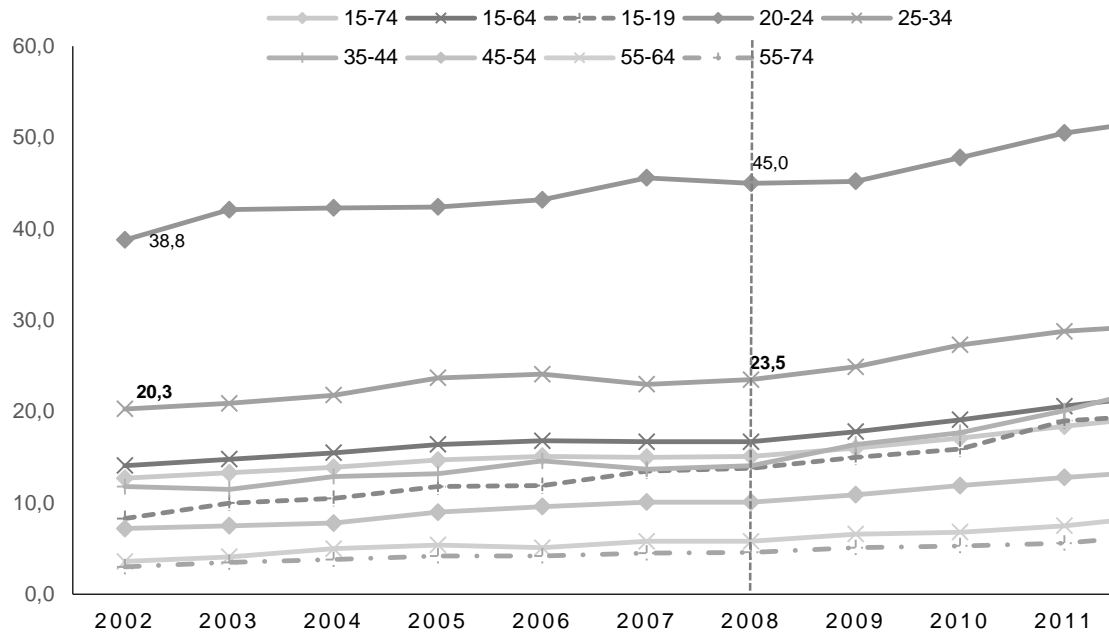
Source: Eurostat

Figure B1.3 Early School Leaving by gender and labour status (%), in Portugal



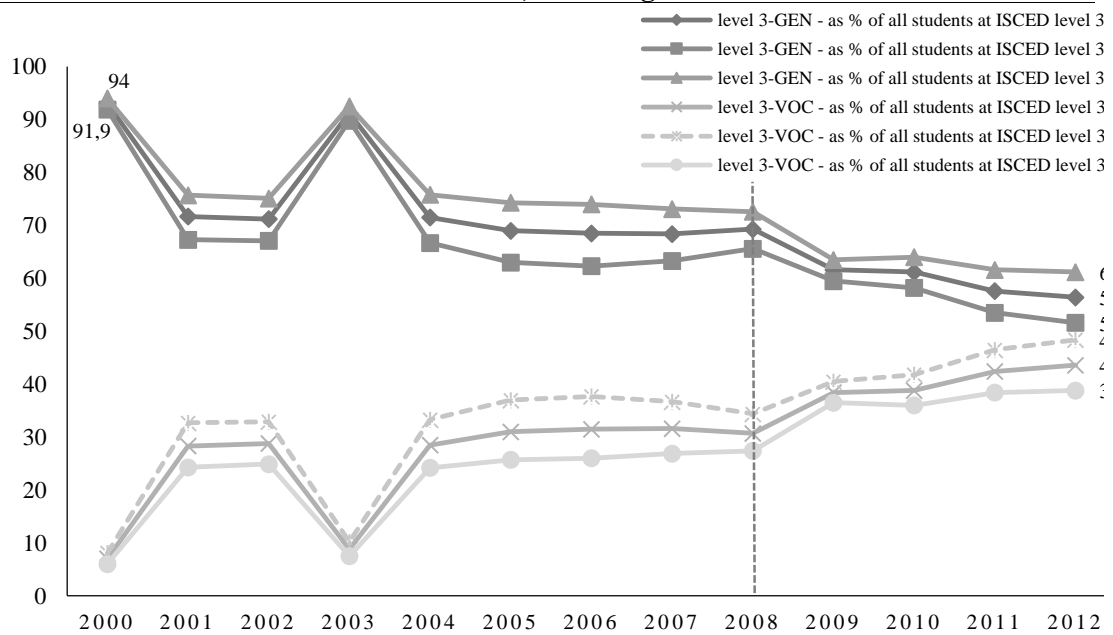
Source: Eurostat

Figure B1.4 Percentage of total population aged between 15 and 74 with Upper Secondary and Post-Secondary attainment, in Portugal



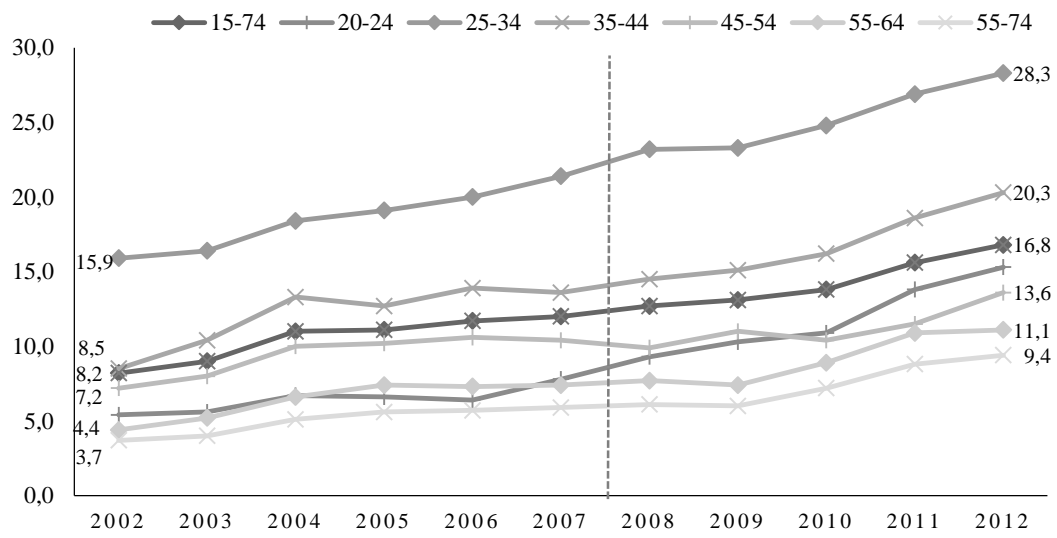
Source: Eurostat

Figure B1.5 Participation/ Enrolment in education, by sex, of students at ISCED level 3-GEN - as % of all students at ISCED level 3, in Portugal



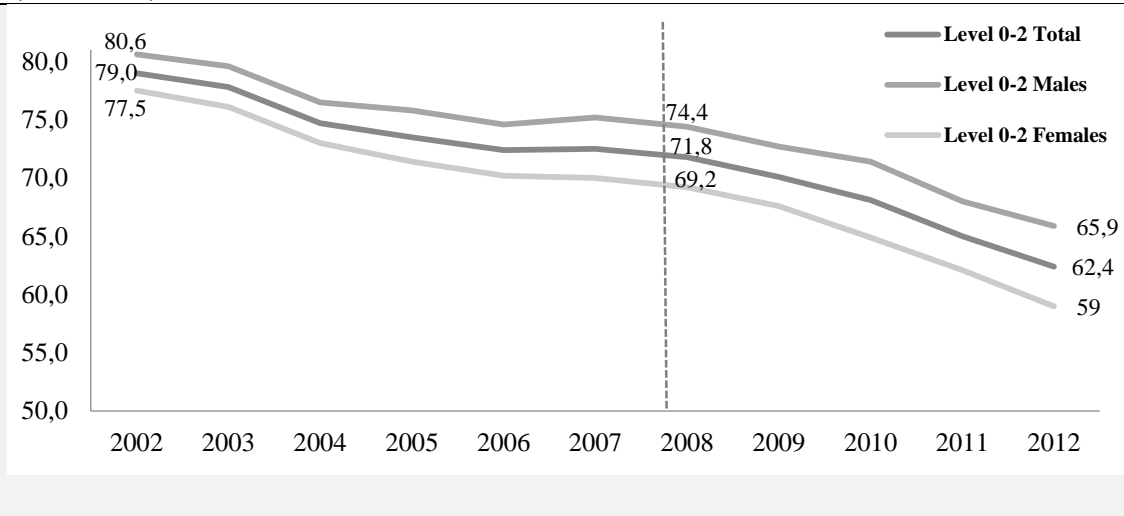
Source: Eurostat

Figure B1.6 Percentage of total population aged between 15 and 74 with tertiary attainment, in Portugal



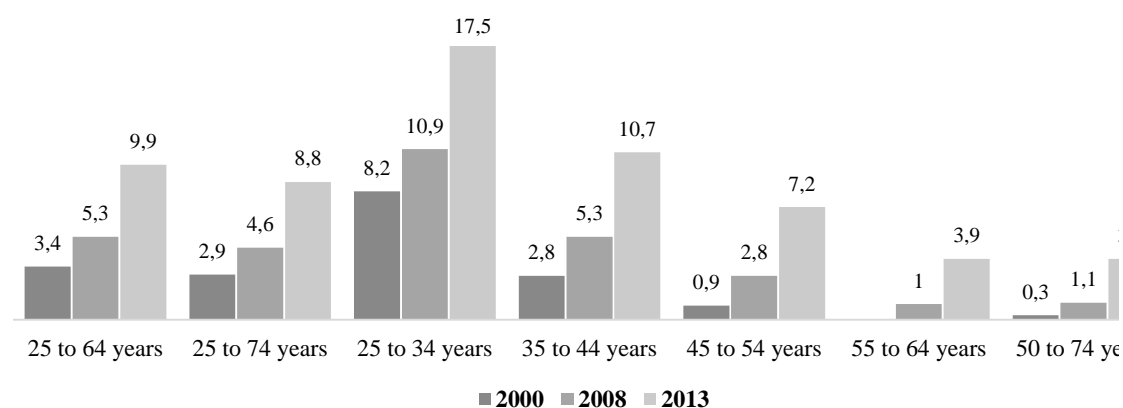
Source: Eurostat

Figure B1.7 Percentage of population aged 25-64 below secondary attainment, in Portugal (2002-2012)



Source: Eurostat

Figure B1.8 Participation rate in education and training (total) by age groups, in Portugal



Source: Eurostat

B2. Conclusive notes

Equity in an educational system means equal access and equal opportunities in success and further, a society with better levels of cohesion and social inclusion.

The ongoing economic and financial crisis enlarged the discussion on efficiency of educational Systems in the European context. European Union and OCDE launched key reports on education (Education and Funding, 2011, OCDE; ...), results, outcomes and processes of funding. The central question remains: within times of crisis, how to maintain equity in an educational system with quality and still guaranty efficiency in financing the system?

This report analyses several issues which don't confine financial matters or expenditure levels', selecting a battery of indicators which portray our educational system and its reply to financial crisis, compromising equity: How selective is our educational System? Should we expect efforts to continue on the path of convergence allowing us to promote equity, or should we have a more "rationalized" education system, with restrict capital to implement, functioning basically to accomplish its primary objectives? Is the financial and economic crisis the explanatory variable of the compromise on restrictions observed in same educational areas? We propose this is a matter of what we considered to be 'Education' and its main proposals.

From 2000 until the outcome of the crisis, the general awareness of our backwardness in educational and qualifications had served a long list of policies that

contributed to the expansion of the education system. A process of reversion concerning structural problems in qualification, through the implementation of measures for adults and lifelong learning, the development of the 'public school' and of an aiding system, the inclusion of specific segments, in public schools such as special need pupils, the development of school offer and vocational areas. The results can lead us to two different lines of discussion. The recovering level, where better performances are seen in international exams and evaluations (PISA). On the other hand, the persistence of structural problems and low qualification of population among European countries, high levels of ESL. Most recently we can add a third line: in a context of crisis and public expenditure restriction, we are detecting sectors that are clearly being affected, jeopardizing not only equity, but all of our society and, in this sense, an educational system with quality providing a good service to its communities. By quality we assume the processes that guarantee promotion of equity: political measures concerning specific segments and educational sectors; or programmes, for instance, dedicated to improvements on schools facilities (the interruption of the "parque escolar" program) in order to demonstrate the compulsory school as well as good conditions of learning, teachers training and curriculum development, or even the more organizational aspects of our educational system. For example, we assist to the progressive 'autonomy' of schools, considered to be a good process in order to increase results and performance, but insisting on a centralized "placement" system of teachers, which in this last academic year presented serious flaws.

These processes that are linked to quality and a 'functional' educational system are also being compromised. Affected by budget cuts, and above all by political ruptures. The main implication is seen objectively in policy-making, and then on results –retraction on policy investment in specific segments – Special Education, Adults: Restructuring human resources and dismissal of teachers. Ending with programmes for adults (programs where were invested millions with very significant results) implementing new exams and selective mechanisms (which are expensive "tools") among several other factors, that lead us to conclude that equity, which has been an achievement of our last 30 years, is clearly on a path of regression instead of convergence and development. Our education system has been struggling with a degree of selectivity as, implementing cuts and restructuring main areas which are not away of contained efficiency but, most of all, a backwardness with costs for many years to come.

The mentioned efforts have been mostly national but had great international influence. Domestic policies aimed to respond to the international directives. The participation in international systems of evaluation, such as PISA, PIRLS, TIMSS, PIACC or statistical platforms like Eurostat and others, allowed to a diagnoses in our main problems, having a comparative perspective; targeting the main areas where policy making should be more centred. But also, in times of crisis, as good “advisers”. From international agents like OCDE and EU, we are getting clear signs: education should not be an area with severe cuts and restrictions; our system is selective, with great levels of retention. New Opportunities Program was considered of most importance with positive results; qualification of adults should be of most priority. Early School Leaving must have clear measures considering Success. Finally, we’ve noticed an increase on the amount of exams, including in earlier phases of school; an increase of retention, especially in secondary; ending programmes that were designed to sustain success – plans of maths and reading, among other measures.

In the period of analysis – characterized by the economic and financial crisis, as well as a social and political commotion – a performative discourse in Europe had impacts on the international community. Portugal, as well as its counter partners in southern Europe “would have been living beyond their means”. Rebutting this argument we have tried to demonstrate in this report that the transition between the XVIInd Constitutional Government 2005-2009 and XVIIIrd Constitutional Government 2009-2011) to the XIXth Constitutional Government, 2011 - until present) implied a political change, catalysing the economic recession instead of stanching it. We argue that this was due to an instrumentalization of the process: our educational system has also lived beyond of its means, creating an increasingly elitist education policy, less equitable.

b) Spain

ECSE Research project: “Educational Challenges in Southern Europe. Equity and Efficiency in a Time of Crisis” (2013-2015)
Institute of Lisbon **University**

UNIVERSITY, CITY (Spain)

Research team: Rafael Feito

Updated: February 2015

Contents

LIST OF TABLES AND FIGURES	27
A1. NATIONAL CONTEXT DESCRIPTION	97
A2. DESCRIPTION OF THE EDUCATIONAL SYSTEM..... ERRO! MARCADOR NÃO DEFINIDO.	
Governance: regional autonomy within a centralized framework	106
Student population	109
Teachers.....	111
Annexes.....	113
B. CRISIS IMPACTS IN EDUCATION	116
B1. EQUITY: POLICIES AND ACHIEVEMENTS	119
Funding: autonomous resource management	119
Public and private expenditure in education	120
Special Educational Needs.....	121
Non-compulsory education.....	123
Vocational education	124
Higher education system in Spain (será necessário?)	126
Annexes.....	128
B2. FINAL NOTES ON EQUITY AND QUALITY	132

List of tables and figures

Tables

A1. National context description

Table A1.1 At risk of poverty rate

Table A1.2 Educational attainment of 25-64 year-olds (2012)

A2. Description of the educational system

Table A21. Evolution of not university teachers at the state sector (2012-2013)

B1. Equity: Policies and achievements

Table B1.1 Unemployment rates of the population

Table B1.2 Adults (25 to 64 years old) by level of qualification (%), 2010

Table B1.3 Number of students and share of foreign students by educational level

Table B1.4 Pupils enrolled in academic (bachillerato) and vocational (CFGM) upper secondary education, in Spain

Table B1. 5 Academic staff and administrative and service staff (P.A.S.) at universities.

Table B1. 6 Evolution in the number of universities

Table B1.7 - Pre-School Enrolment - Pre-primary education (level 0)

Figure B1.8 Early School Leaving by gender and labour status (%), in Spain

Figures

A1. National context description

Figure A1.1 Evolution of Population in Spain, (2003-2014)

Figure A1.2 Evolution of the Gini coefficient in EU-27 and Spain (2000-2012)

Figure A1.3 Percentage of 20-34 year-olds in tertiary education, by parents' educational attainment,

Figure A1.4. Percentage of adults scoring at literacy proficiency Level 4/5, by educational attainment

A2. Description of the educational system

Figure A2.1 Students in pre-primary, primary, lower secondary, upper secondary and tertiary education (2012)

Figure A2.2 Evolution of the students number with lower secondary or second stage of basic education (level 2)

Figure A2.3 Evolution of the students number with upper secondary education (level 3), by sex and age groups

Figure A2.4a Evolution of participation/ enrolment in education (15-24 years) by sex, in Spain

Figure A2.4b Evolution of participation/ enrolment in education by age groups, in Spain

Figure A2.5 Evolution of students in primary education or first stage of basic education (level 1)

Figure A2.6 Evolution of students in lower secondary or second stage of basic education (level 2)

Figure A2.7 Evolution of students in students in upper secondary education (level 3), in Spain (2000-2012)

B1. Equity: Policies and achievements

Figure B1.1 Early school leavers (%) 2000-2013

Figure B1.2 Youth unemployment rates, by ISCED, in Spain (2000-2013)

Figure B1.3 Public and private expenditure on education, percent of GDP (2000-2010)

Figure B1.4 Total students in pre-school, in Spain

Figure B1.5 Enrolment in upper secondary education by programme orientation (OECD)

Figure B1.6 Vocational education, 2010-2013.

Figure B1.7 Participation rate in education and training, by sex and age, in Spain (2000-2013)

Figure B1.8 Percentage of total population aged between 15 and 74, with tertiary attainment

Figure B1.9 - Financial aid to pupils as % of total public expenditure on education, by ISCED level, in Spain

Figure B1.10 - Annual expenditure on public and private educational institutions per pupil/student

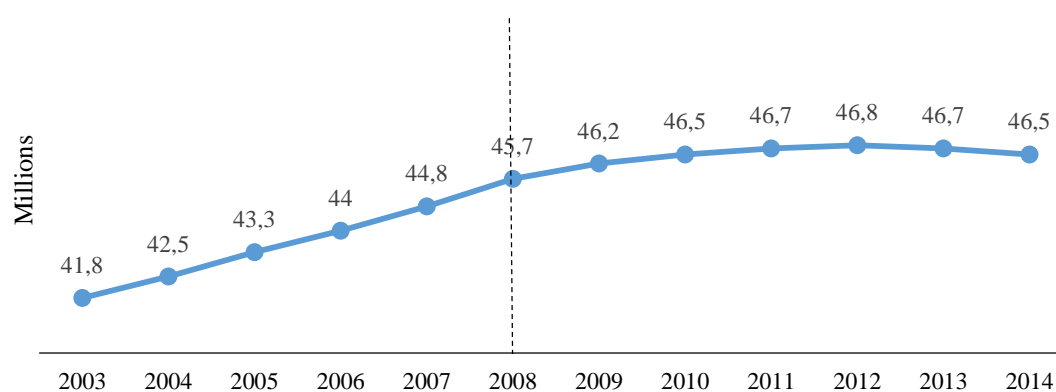
Figure B1.11 Percentage of total population with Upper Secondary and Post-Secondary attainment

Figure B1.12 Participation/ Enrolment in education, by sex, of students at ISCED level 3-GEN

A1. National context description

Several years before joining the Euro zone, Spain had started a period of sustained growth mainly due to the expansion of the building sector. The entry into the Euro zone gave way to a big impulse to this sector both public (infrastructures such as high speed trains, airports, ports, expensive public buildings and so on) and private (basically apartments in urban and coast areas). Starting with the 21st century Spain received more than five million immigrants mainly employed in the building sector, agriculture, personal services and domestic work. Without this massive arrival the Spanish miracle could not have been possible. For the first time in Spanish economic history, active population was far beyond twenty million people (around 24 million) for a total population of forty five million. Till the beginning of the crisis (around 2008) unemployment rate was moderately low, but since 2008 it has rocketed to more than 25 per cent and quite higher for immigrant and youngsters. As it can be seen in the table below, Spanish population grew steadily till the first years of the crisis and decreased slowly from 2013.

Figure A1.1 Evolution of Population in Spain, (2003-2014)



Source: Eurostat

Entering the Euro zone made possible access for cheap loans which explains the massive growth of the building sector. Now the problem for the Spanish economy is the big number of empty houses –most of them to be demolished as no one will buy them– and underused big infrastructures (airports with no planes at all, public buildings unfinished due to lack of funding, too many high speed train tracks). And, as a sequel,

nowadays one of the biggest problems of Spain is the enormous public and private debt (that amount to a little bit more than the Gross National Product).

Spanish economic growth was based mainly, but not exclusively, on sectors that did not demand high qualifications such as the building and tourist sectors. And what is worse: those regions in which these sectors grew the most the dropouts rates are the highest. In fact, nowadays Spain is the UE country with the higher dropout rate. Unemployment is higher among those with less education and the problem aggravates if we consider the fact of a massive growth of unqualified employment is not expected.

Although Spain has not been under bailout, the country has been forced to reduce its public expenditure quite drastically. In spite of the fact that the economic crisis burst in 2008, public expenditure slashes started as late as May 12th 2010 when the then president, José Luis Rodríguez Zapatero (president of a socialist –PSOE- government) voiced a severe public expenditure cutback in the next eighteen months to come. Five million pensioners, 2.8 million civil servants, hundreds of thousands of old people and infants in need of public aid have been the victims of this slash. The week before May 12th the bonus of southern states were massively sold which dangerously raised their premium risk. Even under these circumstances, current Prime Minister, conservative Mariano Rajoy, promised before and after winning elections in November 2011 to reduce taxes –which, in the end, it as a promise he could not keep.

Since 2010 public employment was not to grow. And in the case of the public employment of policemen, army, public health and education. a rate of ten per cent of replacement –due to retirement- was allowed. So the number of public servants have been declining for the last few years. Anyway, the government rose pensions by a scarce 1% and 400 euros pay for unemployed were extended.

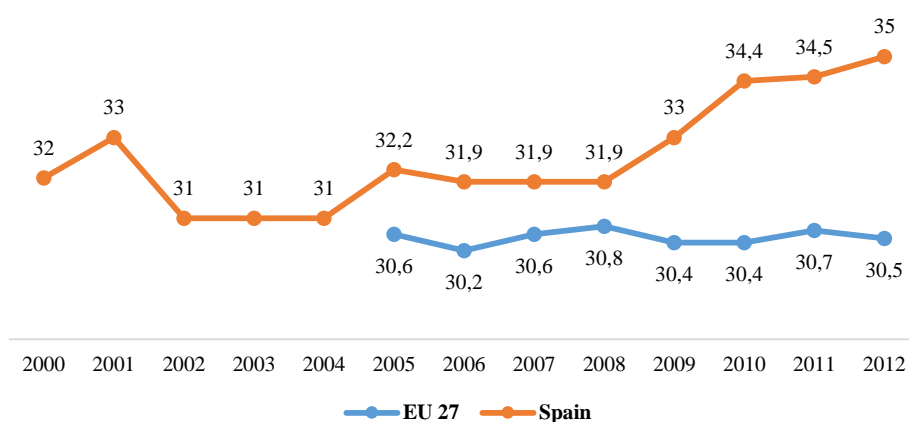
Earlier 2012, the parliament passed, thanks to the absolute majority of the right wing Popular Party, a decree slashing 7200 million euros in public health and 3700 in education. For education the public budget is 22% less than in the previous year. Luckily, remedial education rose to 170 million euros.

Just a little bit later, in July 2012, and faced with the thread of a bailout, the government slashed even drastically public expenditure 65 billion euros in two and half years. This amounts five times the cutback Zapatero made two years ago. Rise of TAV, reduction of unemployment benefits, suppression of Christmas extra pay for civil servants were among the measures adopted.

A research by the University of Granada (<http://www.ugr.es/~julianalbertodiaz/research/PEN3-PAP-Y211.pdf>) estimates that pensions will be reduced by one per cent each year till 2015 and half of pensioners will earn no more than minimum pension.

Income inequalities are growing and putting in jeopardy the country's social structure and creating relatively enduring gaps in the social tissue. The evolution of Gini's coefficient speaks volumes as it grew three points since 2000.

Figure A1.2 Evolution of the Gini coefficient in EU-27 and Spain (2000-2012)



Source: Eurostat

The same happens with the evolution of the risk of being poor, which rose more than four points (five points higher than the EU average) affecting to almost one of every Spanish citizen.

According to a report by Bertelsman Stifting Foundation, starting in 2007, the population at risk increased by four points each year. In 2014 this percentage amounts to 27,3%. But more worrying still is the percentage for population aged 0-27 years: 32,6%, one of every three (almost five points above European average). *Save the Children* shares this same diagnosis. Early 2014 informed that 33,85% of Spanish children were on the verge of social exclusion. Infant poverty rose from 2009 till 2010 from 23,7% till 26,2%.

Social inequality levels are clearly linked with the educational context, where education has impacts on social and economic sectors: the lower the level of education the higher the level of unemployment.

Despite the significant improvements observed in the rates of early school leaving, there is still a persisting educational deficit, turning the lowest levels of educational

attainment among Spanish population particularly onerous for the persistence of social inequalities.

Table A1.1 At risk of poverty rate (cut-off point: 60% of median equivalised income after social transfers), in EU27 and Spain (2000-2012)

Years	Total		Males		Females	
	EU 27	Spain	EU 27	Spain	EU 27	Spain
2000	:	18	:	17	:	19
2001	:	19	:	17	:	20
2002	:	19	:	18	:	21
2003	:	19	:	18	:	20
2004	:	20,1	:	19,1	:	21,1
2005	16,4	20,1	15,6	18,9	17	21,3
2006	16,5	20,3	15,7	18,8	17,2	21,8
2007	16,5	19,7	15,7	18,6	17,3	20,8
2008	16,4	20,8	15,5	19,5	17,4	21,9
2009	16,3	20,1	15,4	19,1	17,1	21,1
2010	16,4	21,4	15,6	20,8	17	22,1
2011	16,9	22,2	16,1	21,6	17,6	22,7
2012	17,1	22,2	16,5	22,2	17,8	22,1

Source: Eurostat

A1.1. Qualification of the population aged 25-64

About one in three adults in Spain has tertiary education. In 2012, 45% of the country's 25-64 year-olds had below upper secondary education (i.e. had attained at most lower secondary education) as their highest level of attainment (the OECD average was 24 %); 22% had upper secondary education (the second level of baccalaureate or first level of Vocational Training completed) as their highest level of attainment (the OECD average was 44%); and 32% had completed a tertiary education (upper level of vocational training or a college degree) (the OECD average was 33%).

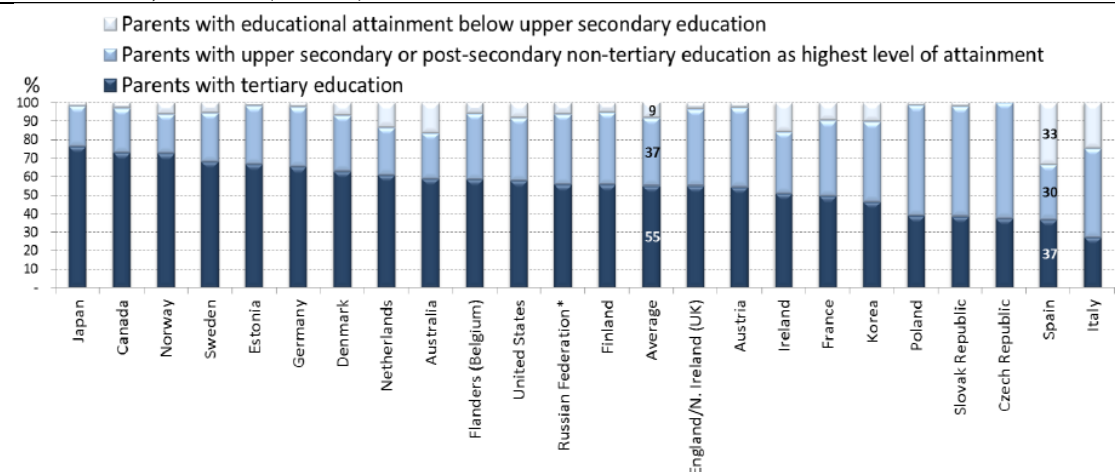
In Spain, **54% of adults aged 25-64 have earned the equivalent of a high-school degree**, much lower than the OECD average of 75%. Across the OECD, slightly more men aged 25-64 have the equivalent of a high-school degree compared with women from that same age group. In Spain however, **53% of men have successfully completed high-school compared with 55% of women**. Among younger people – a better indicator of Spain's future – **65% of 25-34 year-olds have earned the equivalent of a high-school degree**, also lower than the OECD average of 82% but showing progress.

Table A1.2 Educational attainment of 25-64 year-olds (2012)

	Bellow upper secondary	Upper secondary or post-secondary non-tertiary	Tertiary
OECD average	24	44	33
Spain	45	22	32

Source: OECD

Younger adults have higher levels of education than members of their parents' generation. Spain is one of the six OECD countries (along with Chile, Italy, Mexico, Portugal and Turkey) where less than 60% of 25-64 year-olds have attained an upper secondary or tertiary education (i.e. have attained a level above lower secondary education); the OECD average is 77 %. But 64% of Spain's 25-34 year-olds have attained at least an upper secondary education – a remarkable increase when compared with the relatively small share (35 %) of 55- 64 year-olds with the same level of attainment.

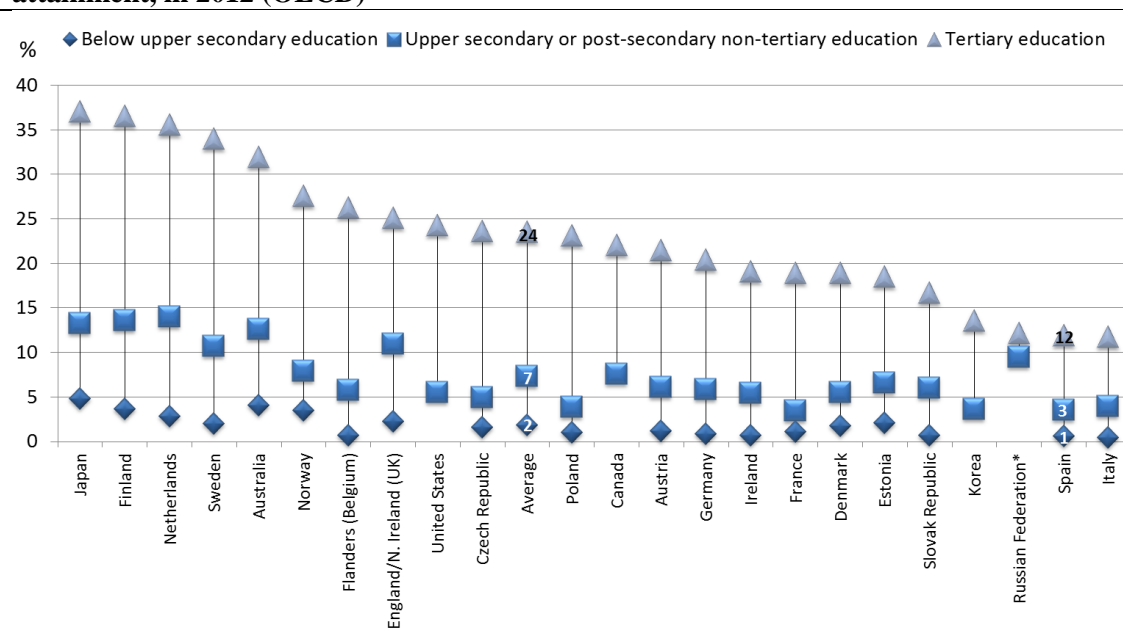
Figure A1.3 Percentage of 20-34 year-olds in tertiary education, by parents' educational attainment, in 2012 (OECD)

Source: OECD *Education at a Glance 2014*. Table A4.1a.

Around 12% of tertiary-educated adults in Spain perform at the highest level of proficiency in literacy (Level 4/5) as measured by the 2012 Survey of Adult Skills. By comparison, across OECD countries, 24% of tertiary- educated adults do, while in Australia, Finland, Japan, the Netherlands and Sweden, more than 30% of tertiary-educated adults perform at that level

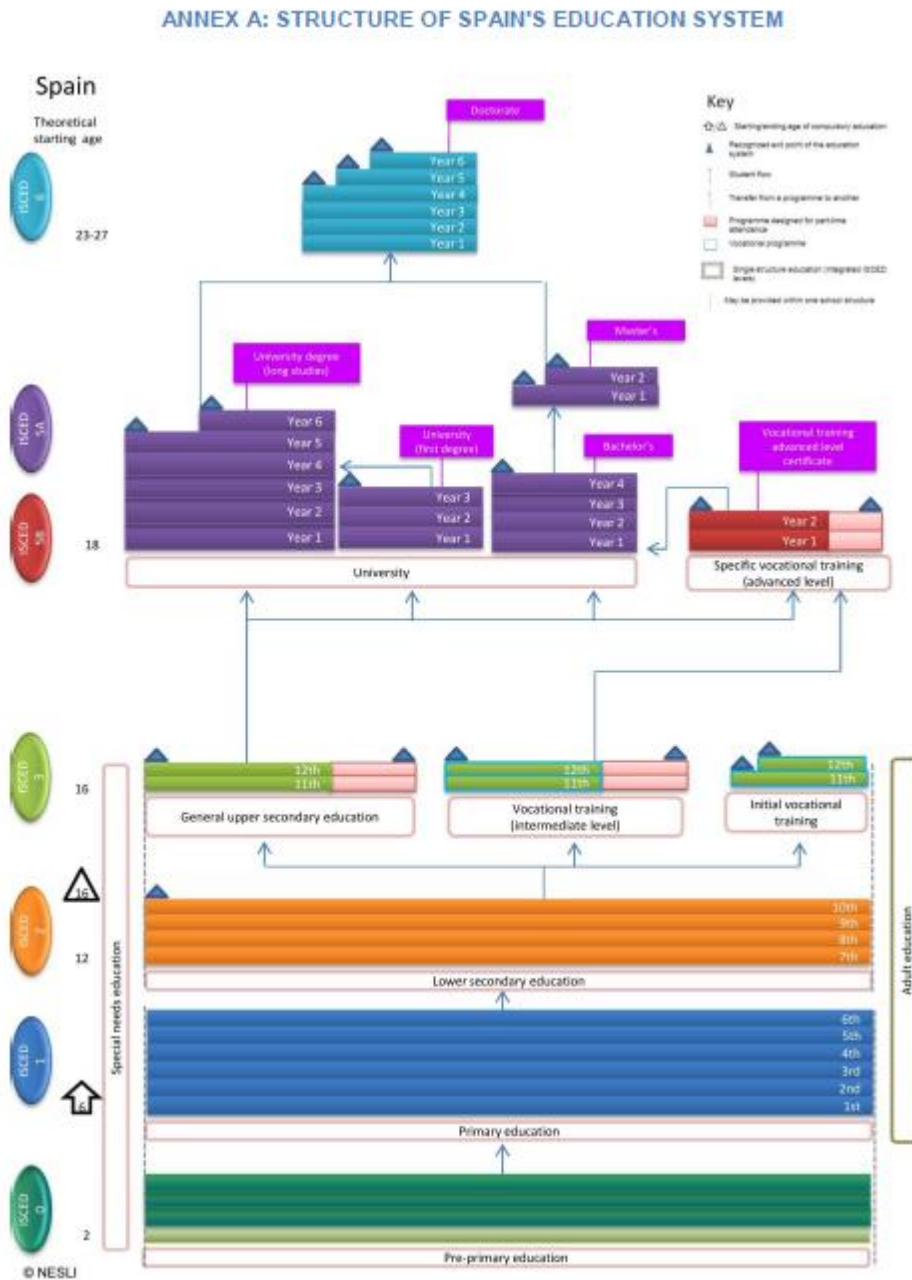
Meanwhile, around 10% of tertiary-educated adults in Spain perform at the highest level of proficiency in numeracy (Level 4/5). By comparison, the average across the 24 countries and sub-national regions that participated in the survey was 26% for this level of education.

Figure A1.4. Percentage of adults scoring at literacy proficiency Level 4/5, by educational attainment, in 2012 (OECD)



Source: OECD, Survey of Adult Skills, 25-64 year-olds

A2. Description of the educational system



A new reform is nowadays in process of implementation. The Organic Law for the Improvement of Educational Quality (Ley Orgánica para la Mejora de la Calidad Educativa, LOMCE, 2013) proposes to introduce –through academic tracks- student pathways at age 15 instead of 16, ease the transition into upper secondary vocational education programs for less academic students, provide more autonomy to schools and school leaders, and impose external student assessments. To be implemented starting in September 2014, the reform is wide-ranging:

** It aims to define core common basic education throughout the country while taking into account the special requirement of regional governments. Together with evaluations for the entire national territory, the aim is to tackle the large differences among regions.

** It introduces a new Diploma on Basic VET which lasts two years for students between 15 and 17, ends with a professional certificate and gives access to Intermediate Level VET (ciclos formativos de Formación Profesional). Students can also take the final examinations to obtain one of the two diplomas in Compulsory Secondary Education (Educación Secundaria Obligatoria, ESO).

** It establishes greater autonomy for schools in schedule, content and pedagogical approaches and will allow further autonomy in co-operation with the regional administrations.

** It modifies the selection process for school leaders to require candidates to have taken a specialized training course, to value previous experience and to consider candidates from any school (in the past, priority was given to internal school candidates).

** It introduces external assessments at the end of each stage of education. The tests will be for diagnostic purposes only in primary education, and are high stakes in lower and upper secondary education.

Under this reform, students in the last year of lower secondary education will be channeled into either general academic courses or more vocationally oriented courses that combine academics with specific training in one or more professional profiles. At the end of the year, students can take either the academic or the vocational examination, leading to a diploma that will give them access to one or other pathway, either Baccalaureate or vocational education and training (VET)

Most of Schooling in Spain is state funded –in public and private schools- and is compulsory between the ages of six years and sixteen. Although non-university education in state-funded schools is free in Spain, parents must pay for books, materials, and sometimes uniforms for their children. And in the case of private subsidized schools is quite common to pay a quota in a monthly basis. Once the required schooling is finished, a student can then opt to continue on to upper secondary education: *bachillerato* (academic education) or move on to the second level of vocational education.

There are three categories of Spanish schools in the **Spanish education system**: public schools, state-funded private schools (*colegios concertados*) –most of them catholic- and private schools (*colegios privados*).

The structure of the Spanish Education System follows the Fundamental Law of Education passed in 1991 (LOGSE). Although the current law is LOMCE (Organic Law for the Improvement of Education) the education structure remains the same.

Infant education is divided into two cycles, the first cycle is for children between the ages of 0-3 years old and the second cycle is for children from 3-6 years old. The second cycle is often considered as an integral part of the education system. Normally, the first cycle of preschool is taught in special nursery schools or daycares (*colegios infantiles*) and the second cycle is taught at primary schools.

Primary education in Spain is the beginning of the compulsory **education in Spain**. Primary school is made up of 6 academic school years from age 6 through 12.

The objective, according to the Ministry, is to give Spanish students a common basic education in culture, oral expression, reading, writing and arithmetic. Required courses include: social studies, art education, physical education, the Spanish language and, if different, the official language of the Autonomous Community, foreign languages math and, if demanded by parents, Religion (Catholic –by far the most demanded-, Protestant, Muslim and Jewish).

After primary school in Spain students must continue on to Compulsory Secondary Education (ESO) which generally lasts from age 12-16. **Spanish secondary education** is divided into two cycles lasting three years the first one being the fourth course the second cycle.

Once a Spanish student graduates from ESO, students have three different choices: academic upper secondary education or Baccalaureate (*Bachillerato*), second level of Vocational/Professional training (Electrician, hairdresser, etc) or entering the labour market.

The academic upper secondary school branch (Baccalaureate) is non-compulsory and free in public schools but not in *colegios concertados*- and consists in two academic

years for students aged 16-18. The Spanish Baccalaureate consists of a series of required common classes, elective classes and specialization classes known as “*modalidades*”, or concentration in a certain disciplines. A student must specialize in one of the offered disciplines and if the students plan to continue on to university, certain concentrations may be required in order to be admitted into certain university programs.

Students who successfully complete the requirements of the Baccalaureate will receive a diploma. They may then opt for the third level of vocational training, a university education, or in some cases both. In order to continue on to the university they must take an entrance exam (*Prueba de Acceso a la Universidad - PAU*). The test results together with the student's academic record and grades will determine not only access to the university but also which degrees the student can pursue.

There are two types of **vocational training in Spain**: Middle Grade Training cycles (*Ciclos Formativos de Grado Medio*) and it requires ESO degree (compulsory education) diploma and Superior Training Cycles (*Ciclos Formativos de Grado Superior*) for those who possess a Spanish Baccalaureate diploma. Those who complete a Superior Training Cycle may then pursue certain university degrees.

Spanish University degrees are usually four years long, with the exception of medicine degrees and some others which are 6 years long. By 2010, in accordance with the European Commission of Education and Training, Spanish higher education will consist of: Bachelor degrees (Grado) for four year programs, Master degrees for one to two years post-graduate programs, and Doctorates for post-masters education.

Governance: regional autonomy within a centralized framework

The Spanish education system is relatively decentralized. Through the Ministry of Education, Culture and Sport (*Ministerio de Educación, Cultura y Deporte, MECD*), the central government designs the legal framework regulating the principles, objectives, and organization of the different school levels, as well as a proportion of the contents and subjects studied. Ministries (or departments) of education from the 17 regions develop and manage their education systems based on these guidelines. Other bodies also shape education policy:

** The Education Sector Conference (*Conferencia Sectorial de Educación*) brings together the MECD and regional authorities to develop education policy for a coherent and inclusive education system.

** Within the MECD, the State Secretariat for Education, Vocational Training and Universities (*Secretaría de Estado de Educación, Formación Profesional y Universidades*) is the main body defining qualifications for the education system and teachers and for promoting equity policies.

** The State School Board (*Consejo Escolar del Estado*) brings together key education stakeholders, including school owners, teachers' unions, parents and student representatives, and provides advice on the education programme, quality, school funding and innovation at the school level.

** The university sector is guided by the national conference of university deans (*Conferencia de Rectores de Universidades Españolas*, CRUE).

** Higher-level arts education is the responsibility of the central government, with advice from regional governments and the Higher Board of Arts Education (*Consejo Superior de Enseñanzas Artísticas*) regarding the structure and basic course content. The Regional Councils for Advanced Artistic Education (*Consejos Autonómicos de Enseñanzas Artísticas*) focus on advanced art education.

** Regional Councils for Vocational Training (*Consejos Regionales de Formación Profesional*) prepare their Regional VET Plan, evaluate vocational education and propose improvement of the VET system.

** Local authorities or municipalities work with the regional ministries to monitor early childhood education and care as well as compulsory and special education schools, among other responsibilities

Most schooling decisions in Spain are taken by the regions or the central government (approximately 43% of decisions in lower secondary education), and about one-quarter of decisions are taken by schools. Regional authorities have responsibility for organizing and delivering education and maintaining schools, and for decisions on funding (including teachers' salaries), on part of the curriculum, among others. Targeted capacity-building at these levels to support decision-making and implementation of these decisions can help to promote better results. School Councils (*Consejos Escolares*), which formally participate in decision-making in schools, include representatives of the teaching and student body, the town council, parents (slightly more than a tiny ten percent

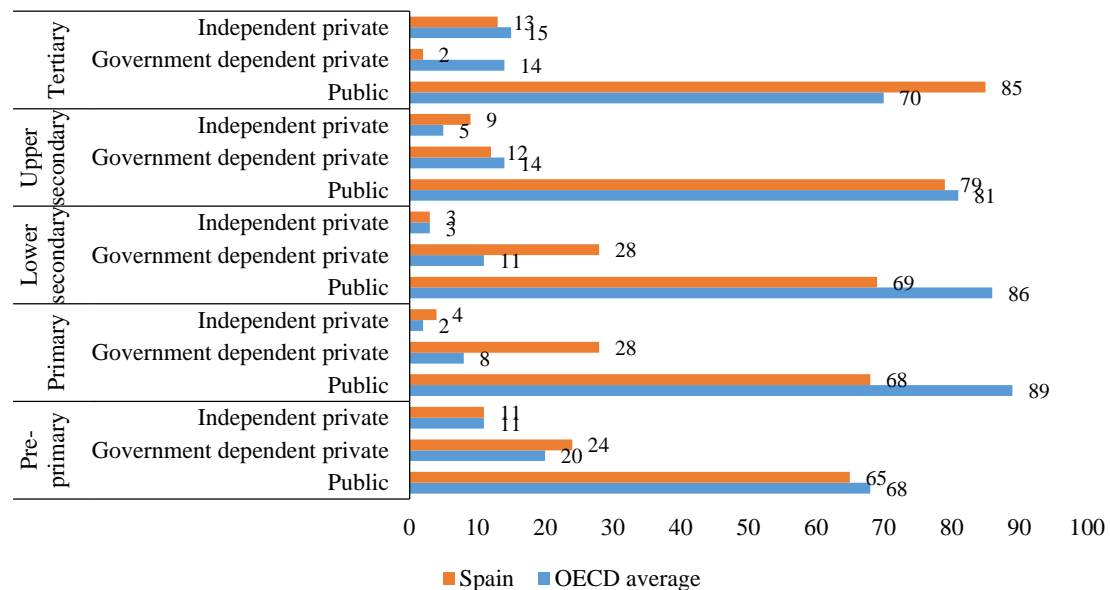
of them vote for selecting their representatives) and non-teaching staff. In vocational training schools, the councils might include representatives from labour institutions or employers' organizations.

In 2012-13, the university system comprised 79 universities, 50 of which were public and 29 private. Administrative and political matters in higher education are coordinated by the General Conference of University Policy (*Conferencia General de Política Universitaria*), while academic coordination is ensured by the Council of Universities (*Consejo de Universidades*). Each public university has its own governing body, following the framework of the 2001 Organic Act on Universities (*Ley Orgánica de Universidades*). Within the new learning scenario of the European Higher Education Area, each university has established its own internal quality assurance systems as a tool for improving its practice. These quality assurance systems are supervised by the regional educational authorities and by the National Agency for Quality Assessment and Accreditation (*Agencia Nacional de Evaluación de la Calidad y Acreditación*, ANECA).

Most students in Spain attend public institutions. Around seven out of ten students (6-16 year-olds) in compulsory education in Spain were enrolled in public schools in 2012, and enrollments rates in public institutions for higher levels of education are growing. The proportions of students in public institutions (from pre-primary through upper secondary) are smaller than the OECD average: about 65% of pre-primary, 68% of primary, 69% of lower secondary and 79% of upper secondary students were enrolled in public schools in 2012; the OECD averages were 68%, 89%, 86% and 81%, respectively. The proportion of students in compulsory education who attend government-dependent private institutions is larger than the OECD average.

A large share of students attends government-dependent private schools at all levels of compulsory education. In Spain, more than one in four (28%) students attend government-dependent private schools for primary and lower secondary education, while across OECD countries, fewer than one in ten (8%) primary students and just over one in ten (11%) lower secondary students attend such schools. The proportion of upper secondary students in independent private institutions (9%) is four percentage points higher in Spain than on average across OECD countries (5%).

Figure A2.1 Students in pre-primary, primary, lower secondary, upper secondary and tertiary education, by type of school (2012)



Source: OECD, *Education at a Glance 2014*, Tables C7.1 and C7.6

Student population

Since the beginning of the crisis (around 2007) the number of adults enrolled in lower secondary education has doubled which is quite a symptom of the crisis. Many unemployed without credentials have no other choice than to return to the educational system to get at least a lower secondary education degree (which is usually the minimum level required to enter the labor market).

In the same way, there has been an increase in the percentage of adult pupils in upper secondary education. The percentage of young adults who enroll in formal education after finishing compulsory education has been growing at a faster pace than the OECD average. In 2008, some 81% of 15-19 year-olds and 21% of 20-29 year-olds were enrolled in education; by 2012, 86% of 15-19 year-olds and 28% of 20-29 year-olds were enrolled in education. By comparison, across OECD countries, the proportion of 15-19 year-olds enrolled in education increased from 81% to 84%, and the proportion of 20-29 year olds in education grew from 25% to 28% during the same period.

The table below shows the distribution of Spanish population schooled. The crisis has increased the percentage of people remaining at school.

Since 1991 compulsory and basic education corresponds to ten years of cost-free education, from age 6 to 16, divided between primary education and lower secondary education. Basic education lasts for 6 years and, before the passing of new educational law (LOMCE) in 2013, it was divided into three cycles: from 1st to 2nd grades (first one), from 3rd to 4th grades (second one) and from 5th to 6th grades (third one). The decision about course promotion or retention was taken exclusively at the end of each cycle and grade retention is limited (now as well as previously) to only one course all along the primary education.

Lower secondary education comprises four years. In the case of state schools it takes place at the so called secondary education schools (IES). The IES also include the academic branch of upper secondary education (baccalaureate). Students need to pass successfully lower secondary education if they want to study either academic or vocational education. This is quite an issue in a country with more a thirty percent of students that, until very recently, did not get the degree corresponding to the lower secondary education. Most of them usually dropout after reaching sixteen years (most of them have been retained for at least one or more years). The dropout rate is fourteen points higher for boy than for girls. When it was possible to enter non qualified jobs this dropout was far from being a social problem. But nowadays, after the building sector crisis, this is quite a social problem for which a solution must be found.

The number of students in primary education remains, more or less, the same. By contrast, the number of adult students (40 years and over) in primary education has decreased due to the fact that illiterate population is lower than before.

Contrary to what happens for primary education, the number of adult students (40 years and over) has increased, due to the return to educational system of people formerly employed in low level jobs.

The same applies to upper secondary education. The number of younger students remains the same while there is a huge increase of adult students. And, in fact, this is what explains why male students nowadays outnumber females.

Teachers

For the period under consideration (2000-2012) teachers' numbers show an important decrease.

Table A21. Evolution of not university teachers at the state sector (2012-2013)

	<i>Staff</i>		<i>Temporary staff</i>		<i>Total</i>
	2012	2013	2012	2013	Variation
<i>CCAA</i>	419 362	405 284	87 163	68 747	-32 494
<i>MECD</i>	2 903	2 786	1 151	961	-307
<i>Total</i>	422 265	408 070	88 314	69 708	-32 801

Source: Boletín Estadístico del Personal al Servicio de las Administraciones Públicas elaborado por el Ministerio de Hacienda y Administraciones Públicas.

Note: reference period between January 2012 and July 2013

The loss of a high percent of staff means that the school practically had to cease all extracurricular activities and recovery classes for students lagging behind. It also means that each teacher is responsible for more additional students, some of whom have behavioral issues or have had to fall back on charity food banks due to rampant unemployment among their parents. Under the government's reforms, the number of students in school classrooms will increase and the students will become like sardines in a can.

Spanish PISA bad results are object of national scrutiny and controversy. Since the first PISA report in 2000, controversy has revolved around the need of structural education reform, the idea that educational system is not very demanding and pupils are lazy. Anyway, Spain's students are still struggling with reading, science and maths despite all the money the country has spent on trying to improve its educational standards, the latest Pisa study results show.

Spain's educational results remain below OECD averages despite a 35 percent increase in funding since 2003, the results of the triennial OECD-run Pisa study show.

While Spain's 15-year-olds notched up marginal improvements in reading and science scores, mathematics results for the test of students near their end of their compulsory education remained at 2009 levels.

Scores for reading climbed from 481 in 2009 to 488 points in the latest Pisa study. There was also a slight improvement in science results from 488 to 496. But mathematics

scores barely shifted for Spain — moving from 483 points to 488. All this means Spain "remains anchored just below the OECD average" in all three categories, according to Pisa researchers.

There is a worrying trend towards greater inequality among Spain's students. In 2012, wealthier students outperformed less-advantaged peers by 34 points in mathematics, while that gap was just 28 points in the 2003 Pisa study. The gap between boys and girls has also grown in the same period — from nine points to 16. These findings come despite substantial increases in educational funding, with Spain now spending €60,000 (\$81,000) on students aged from six to 15.

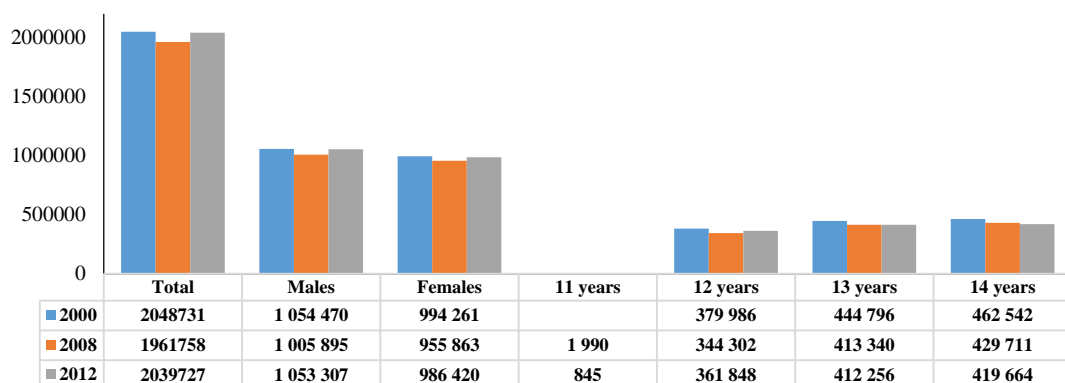
The Pisa researchers said Spain could improve its scores by giving schools greater autonomy over their curriculum. They also said low teacher morale could be prevented by linking positive professional appraisals to higher salaries.

On a positive note, the Pisa study found that 87 percent of Spain's students were "happy at school" compared with an OECD average of 80 percent.

The, till now, country's largest opposition group, the socialist party (PSOE) used the results to attack new government reforms, saying cuts would undo all the good work done by Spain over the last few years. But the Popular Party government pointed out higher spending wasn't necessarily linked to better performance.

Annexes

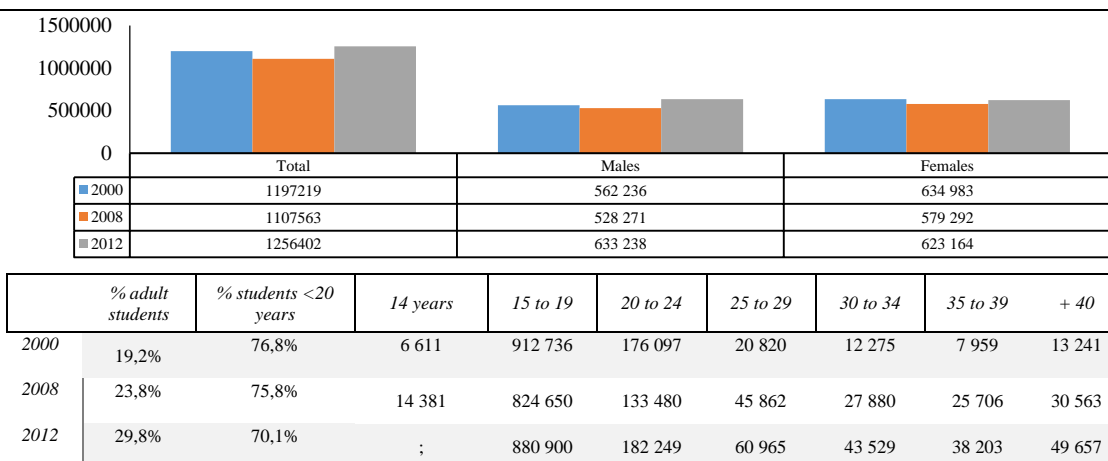
Figure A2.2 Evolution of the students number with lower secondary or second stage of basic education (level 2), by sex and age groups, in Spain (2000-2012)



	% adult students	% students <20 years	Under 15	15 to 19	20 to 24	25 to 29	30 to 34	35 to 39	+ 40
2000	1,3	98,7	1 287 324	734 372	11 100	2 564	3 643	6 594	3 134
2008	3,6	96,4	1 189 343	701 279	31 581	9 345	8 167	5 440	16 603
2012	8,7	91,3	1 194 613	668 234	68 975	27 982	20 924	13 949	45 050

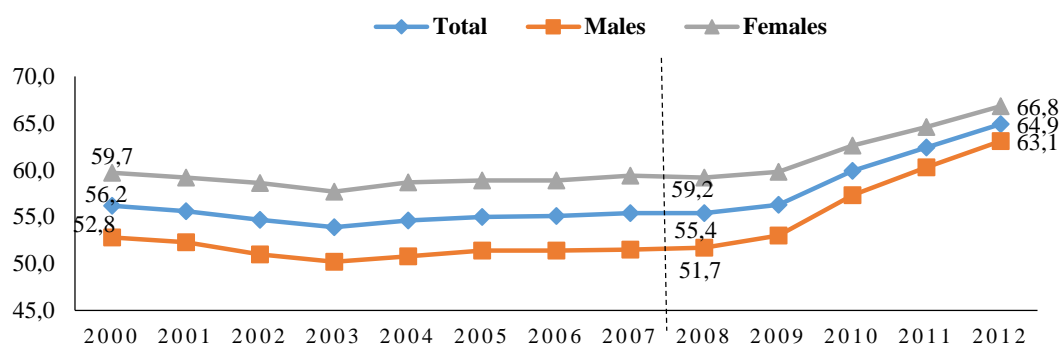
Source: Eurostat

Figure A2.3 Evolution of the students number with upper secondary education (level 3), by sex and age groups, in Spain (2000-2012)



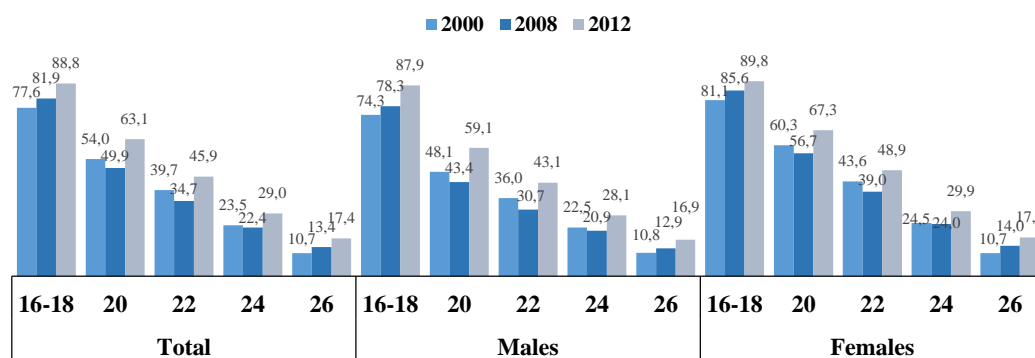
Source: Eurostat

Figure A2.4a Evolution of participation/ enrolment in education (15-24 years) by sex, in Spain



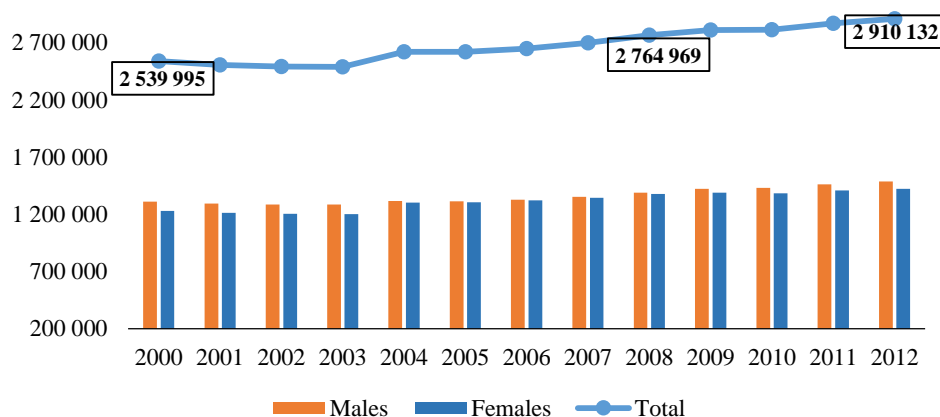
Source: Eurostat

Figure A2.4b Evolution of participation/ enrolment in education by age groups, in Spain



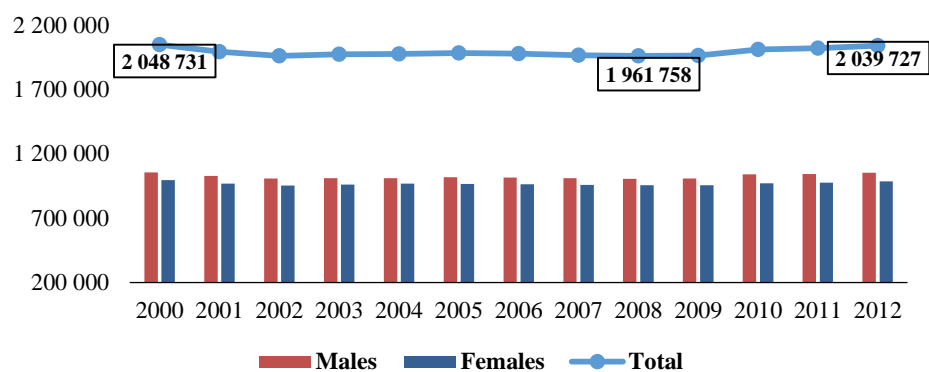
Source: Eurostat

Figure A2.5 Evolution of students in primary education or first stage of basic education (level 1), in Spain (2000-2012)



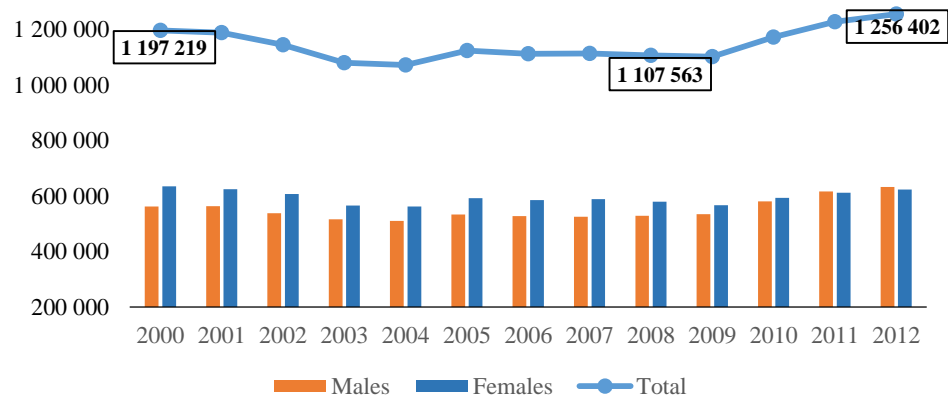
Source: Eurostat

Figure A2.6 Evolution of students in lower secondary or second stage of basic education (level 2), in Spain (2000-2012)



Source: Eurostat

Figure A2.7 Evolution of students in students in upper secondary education (level 3), in Spain (2000-2012)



Source: Eurostat

B. Crisis impacts in education

Increasingly, low levels of education are a barrier to entering labor market. Although, irrespective of the level of education, unemployment rates are quite high in Spain, data show that there is a strong correlation between the rate of unemployment and educational level. Unemployment rates for people with an educational level below lower secondary education are 26% just double than OECD average. People with tertiary education suffer an unemployment rate of 12% (more than doubles OECD average).

The economic crisis in Spain in the last years has highlighted the weaknesses of the Spanish labor market. The severity of the current crisis has destroyed more jobs, and faster, than the major European economies. Data from the Labor Force Survey described this situation well: the number of unemployed people stood at 5.273.600, an increase of 295.300 in the fourth quarter of 2011 and 577.000 from the fourth quarter of 2010. The unemployment rate rose by 1,33 percentage points from the third quarter and stood at 22,85%.

Table B1.1 Unemployment rates of the population aged 25 to 64, by level of qualification (%), 2000 - 2013

	0-2			3-4			5-6		
	2000	2006	2013	2000	2006	2013	2000	2006	2013
EU-27	10,8	10,0	18,0	8,2	7,2	8,6	4,5	4,1	5,9
Spain	13,7	9,1	32,9	10,9	6,8	23,5	9,4	5,5	15,1

Source: Eurostat

Job losses have been most severe in certain age groups, to be precise; the number of job seekers between 16 and 24 years old amounted to 610.688, being 5.916.949 the total number at national level. From these job seeking youngsters, three of four were unemployed (460.561, data 31st December 2011). The difficulties in the transition to the labor market, low starting salaries and the general economic situation are causing youngsters to leave the Spanish labor market and seek opportunities abroad. The youngsters have been severely affected by unemployment as experienced older workers suffering from unemployment are covering posts often offered for juniors.

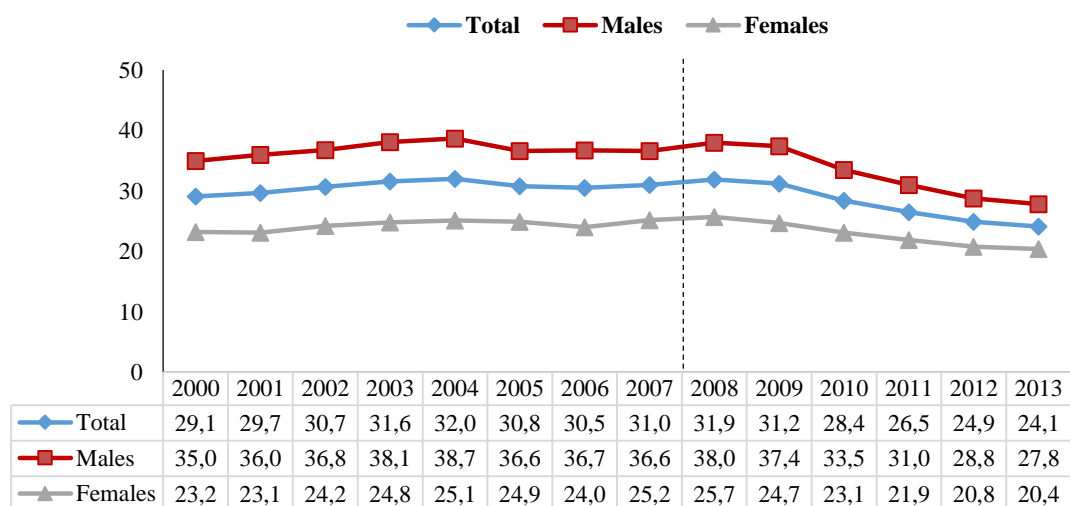
Spanish population structure related to ISCED levels reflects a reduced number of people with intermediate level (with upper secondary and post-secondary qualifications). There is a need to innovate, create incentives and reinvent study programs at ISCED 3 and 4 levels so there are attractive pathways that suit and fit our economy needs.

ISCED	0-2	3-4	5-6
OECD	26	44	30
EU-21	25	48	28
Spain	47	22	31

Source: Panorama de la Educación. Indicadores de la OCDE 2012. (Instituto Nacional de Evaluación Educativa)

In this context a main concern is the high rate of dropouts from secondary and upper secondary studies. Several measures have been developed during the last five years to reduce early school leaving and to increase students skills with flexible learning paths in secondary education to suit different interests, motivations and pupils' progress and a upper secondary path that improve the preparation to high studies and tertiary education so as to raise the qualification level of citizens. Although the rates show a slow decreasing in early school leavers, it is still considered too high.

Figure B1.1 Early school leavers (%) 2000-2013

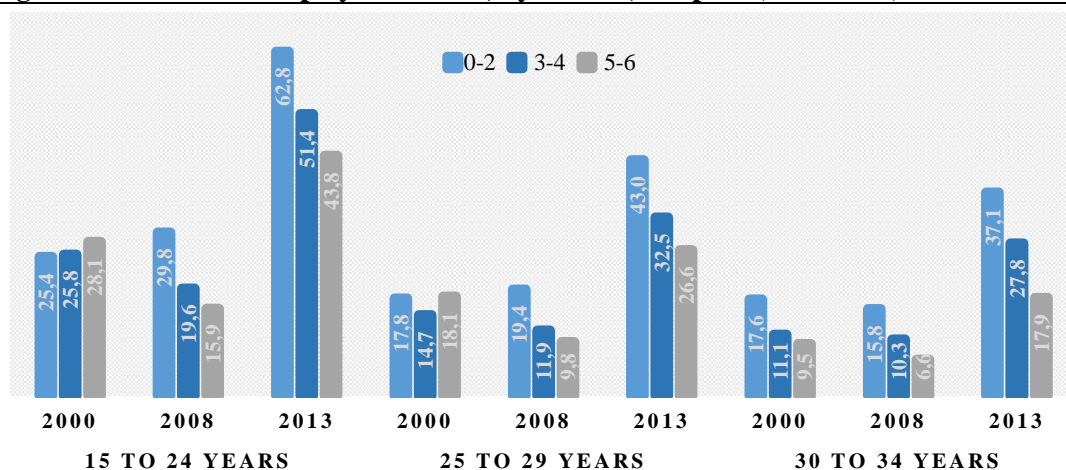


Source: Eurostat (LFS)

The difference in unemployment rates between adults with lower and higher levels of education is particularly large in Spain. The gap in unemployment rates between individuals with a tertiary education and those who do not have an upper secondary or post- secondary non- tertiary education is 15 percentage points or more. But because of the higher level of unemployment overall, a tertiary qualification reduced the risk of

unemployment by only 55% in Spain, compared with the OECD average reduction of 63%. In Spain in 2012, 31.2% of adults with below upper secondary education were unemployed (the OECD average was 13.6%), 22% of those with upper secondary education (there is no postsecondary non-tertiary education in Spain) were unemployed (the OECD average was 7.8%), and 14% of tertiary- educated adults were unemployed (the OECD average was 5%)

Figure B1.2 Youth unemployment rates, by ISCED, in Spain (2000-2013)



Source: Eurostat

In general, the level of unemployment is quite high. It is very high for younger people, for those aged between 25 and 34 years old.

In 2012, one in four 15-29 years-old in Spain was neither employed nor in education or training (NEET) –higher than the OECD average-. When the labor market deteriorates, young people making the transition from school to work are often the first to encounter difficulties. In Chile, Ireland, Italy, Mexico, Spain and Turkey, more than 20% of 15- 29 years-old were neither employed nor in education or training (NEET) in 2012 (the OECD average was 15%). In contrast to most other OECD countries, the largest share of young NEETs in Spain are unemployed (19%; the OECD average is 6%), not inactive (7% while the OECD average is 9%)

This can be explained by the high incidence of young people moving from one short term, temporary contract to another, frequently interspersed with periods of unemployment.

B1. Equity: Policies and achievements

Funding: autonomous resource management

Spain has increased its investment on educational institutions in recent years, but it remains below the OECD average. Expenditure on education institutions reached 5.6% of GDP in 2010 (below the OECD average of 6.3%). Between 2005 and 2010, Spain increased spending by 1 percentage point (above the OECD average of 0.5 percentage points). As in most OECD countries, most expenditure on educational institutions is from public sources (85.4% in 2010, compared to the OECD average of 83.6%) except at pre-primary level, where expenditure from public sources is 26.8% (still higher than the OECD average of 17.9%).

Spain spends comparatively more per student than other OECD countries. From primary to tertiary education, in 2010 expenditure per student (USD 9 484) was higher than the OECD average (USD 9 313), and Spain allocated more per student than the OECD average at secondary and tertiary levels (excluding research and development). Globally, expenditure per student at primary, secondary and tertiary levels increased by 13% between 2005 and 2010, as expenditure increased more than enrolment. Ensuring that this spending is allocated to where it is most needed is particularly important in a context of economic crisis. For example, the total annual cost per student who repeated a grade is estimated at more than EUR 20 000 in Spain. Grade repetition in Spain represents almost 8% of the total expenditure in primary and secondary education – one of the highest rates among OECD countries.

In Spain, in the context of decentralized financial responsibility for education by the 17 regional governments, education is mainly based on public funding sources. Regional governments have autonomy to manage their annual budget and how it is allocated to schools. Schools receive a small amount of funding based on the number of students enrolled. Most students at primary and secondary levels attended publicly funded schools in 2011: about 68% attended public schools and 28% attended publicly-funded private schools, a higher proportion than the OECD average. At upper secondary level, 79% attended public schools and 12% attended publicly-funded private schools. Publicly-funded private schools must meet certain requirements to receive funding.

In addition to public funding, public universities receive private funding from registration and tuition fees, organization of specialized courses, agreements with private enterprises and other sources such as private institutions, which give donations or grants.

In 2010, about 21.8% of funding of tertiary institutions (public and private combined) came from private sources, including 17.6% from households.

Recent budget cuts at national and regional levels affected the education system through budget adjustments starting in 2010, but recent data show that funding has stabilized. Selected programs are being reviewed by the central government (Ministry of Education, Culture and Sports) to make sure that funds invested achieve their aims. Regional governments have also faced budget cuts in order to achieve a -1.5% deficit in regional GDP for 2012.

Table B1.3 Number of students and share of foreign students by educational level, changes between 1999 and 2008, in Spain

	<i>The number of students in 2008 (%), base = 100 in 1999</i>			<i>Share of foreigners (%)</i>	
	All	Nationals	Foreigners	1999	2008
<i>Pre-primary</i>	145.3	136.3	952.7	1.1	7.2
<i>Primary</i>	101.5	91.3	859.7	1.3	11.2
<i>Lower secondary</i>	96.6	87.2	874.1	1.2	10.8
<i>Upper Secondary</i>	64.3	61.9	431.8	0.7	4.4
<i>Vocational training</i>	92	86.2	1307.3	0.5	6.8

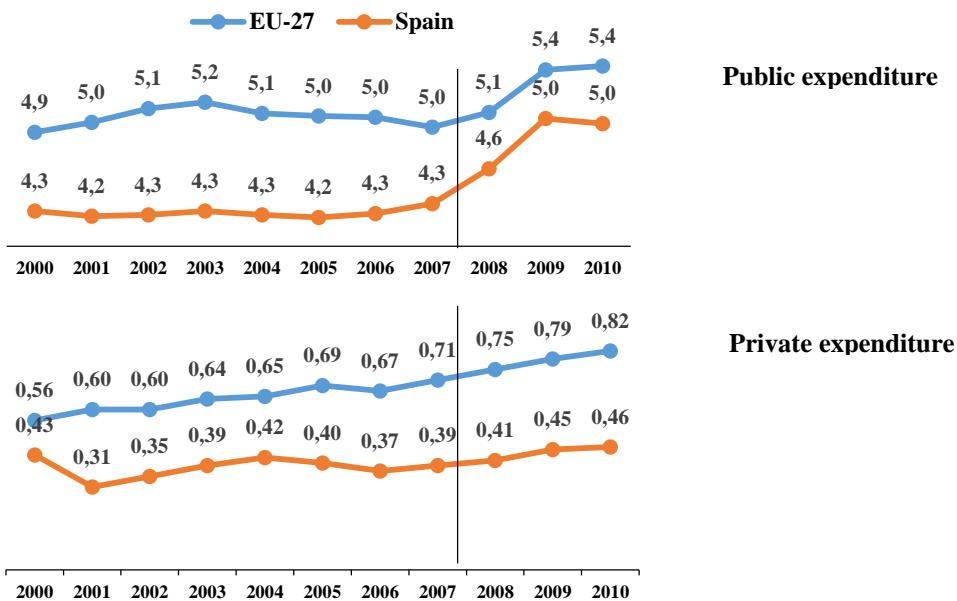
Source: Ministry of education

Together with France, Spain is the OECD country with the highest rate of retention. In fact, when they are fifteen years old, almost fifty percent of male student is in a lowest course than the one corresponding to its age. At what it is worse, according to PISA in focus number 43 among students with similar academic performance, the likelihood of repeating a grade is one-and-a-half times greater for disadvantaged students than for advantaged students but in Spain this likelihood is 3.5 times more.

Public and private expenditure in education

Public expenditure in education as decreased as Spain was entering the economic crisis. It reached its highest point in 2009 and start declining till today, just the opposite of private expenditure.

Figure B1.3 Public and private expenditure on education, percent of GDP (2000-2010)



Source: Eurostat

Special Educational Needs

The educational system will arrange the necessary resources in order for pupils with temporary or permanent special educational needs to achieve the objectives established within the general program for all pupils. The public administrations give pupils the necessary support from the beginning of their schooling or as soon as they are diagnosed as having special needs. School teaching is adapted to these pupils' needs. The schools develop the curriculum through didactic plans, which have to take into account the pupils' needs and characteristics. They also develop an Educational Project, where the objectives and the educational priorities are fixed along with the implementation procedures. In order to prepare this project, they consider the school characteristics, its environment, and the pupils' educational needs.

The law considers three types of specific educational support needs:

- ** Students with special educational needs
- ** High ability students
- ** Late entries into the education system

Students with special educational needs refers to those who require, certain support and specific educational attention due to disability or serious behavioral disorders, either for a period or throughout the whole of their schooling.

Among the ordinary measures (offered to all pupils) contemplated by the educational system for attending to diversity, the following are to be mentioned: successive levels of curricular formulation, involving the progressive adaptation of the official curriculum and optional areas and subjects, which constitutes a resource in the hands of the pupil to enhance and develop his or her personal preferences; the organization of reinforcement and support activities in educational establishments, a very generalized measure of attention to diversity which is usually aimed at the instrumental areas (mathematics and language) and specific grouping. Once ordinary measures of attention to diversity have been applied and have proved to be insufficient to respond to the educational needs of an individual pupil, the education system considers a series of extraordinary measures. These are: repeating a cycle or school year, significant curricular adaptations, support measures for pupils with special educational needs, curricular diversification and, as a last resort, Social Guarantee.

Most autonomous communities have regulated and organized these services through sector educational and psycho-pedagogical interdisciplinary guidance teams and through the guidance departments of secondary education establishments.

For pupils who have serious developmental disorders and cannot attend school to receive their education, for pupils who are hospitalized, or for pupils who must be absent from school for long or repetitive periods of time for medical reasons, the autonomous communities have formulated and implemented various organizational alternatives, among which should be mentioned: peripatetic special education teachers who go to pupils' homes, so that they may receive their educational schooling; itinerant attention on the part of special education schools for under school-age pupils with special educational needs or those who are enrolled in mainstream schools; the setting up of itinerant school support units and school support units in hospitals.

Concerning high ability students it is the responsibility of the Education Administrations to adopt the necessary measures to identify high ability and gifted students and assess their needs as early as possible. Moreover, they should introduce appropriate action plans to meet these needs. The government, after consultation with the autonomous communities, will establish the regulations to allow for flexibility in the length of each stage of the education system in the case of high ability students, independently of their age.

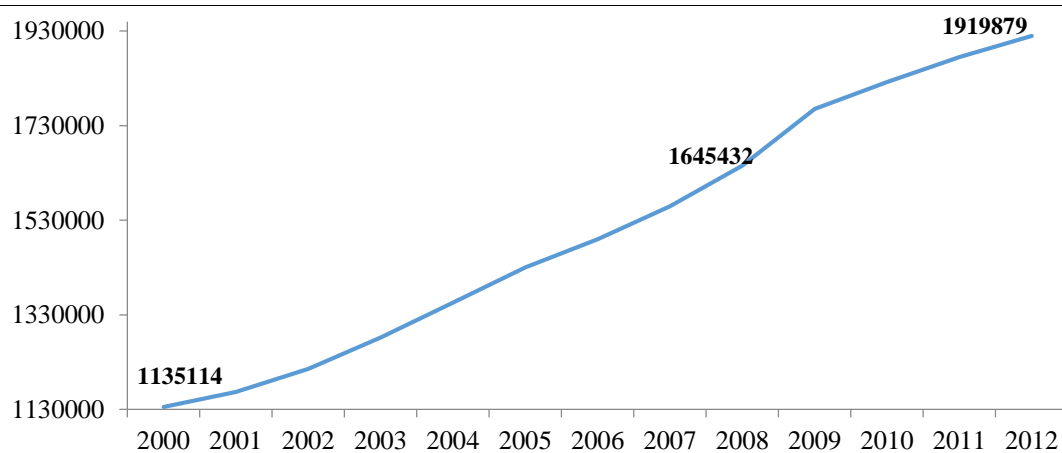
And finally we will consider late entries into the education system. It is the responsibility of the Public Authorities to ensure the incorporation into the Spanish education system of

students who arrive from other countries or who enter the education system late for any reason. This will be guaranteed, at least, for compulsory school age.

Non-compulsory education

Almost one hundred per cent of Spanish children are schooled when they are three years old especially for the children under three years old which has continue to grow all along the period 2000-2012.

Figure B1.4 Total students in pre-school, in Spain (2000-2012)

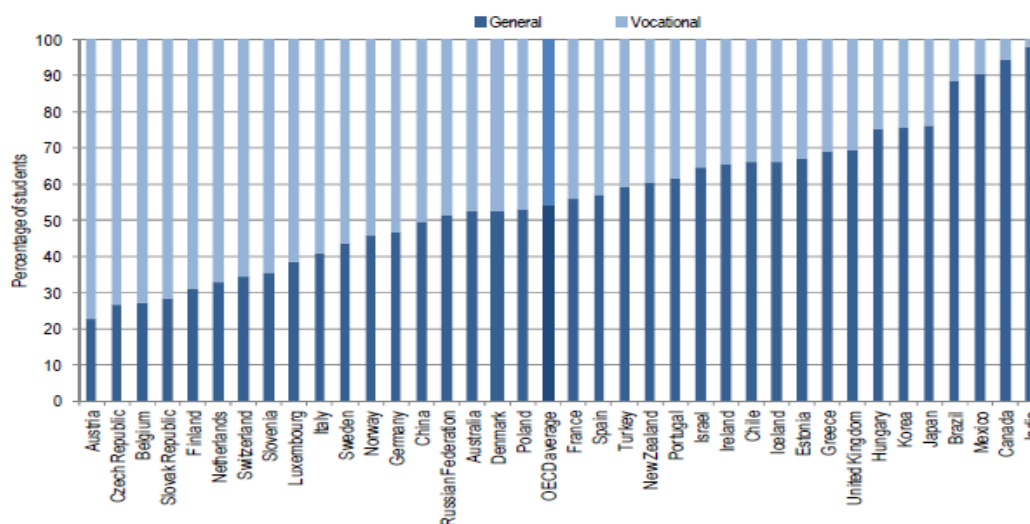


Source: Eurostat

Vocational education

Slightly a little bit more than fifty percent of the students opt out for the academic branch – a little bit more than the OECD average.

Figure B1.5 Enrolment in upper secondary education by programme orientation (OECD)



Source: OCDE, Education at a Glance 2014, Figure 2.4, Students enrolled in general or vocational education and training programmes (2009)

In the last year a big growth of students enrolled at vocational education has taken place.

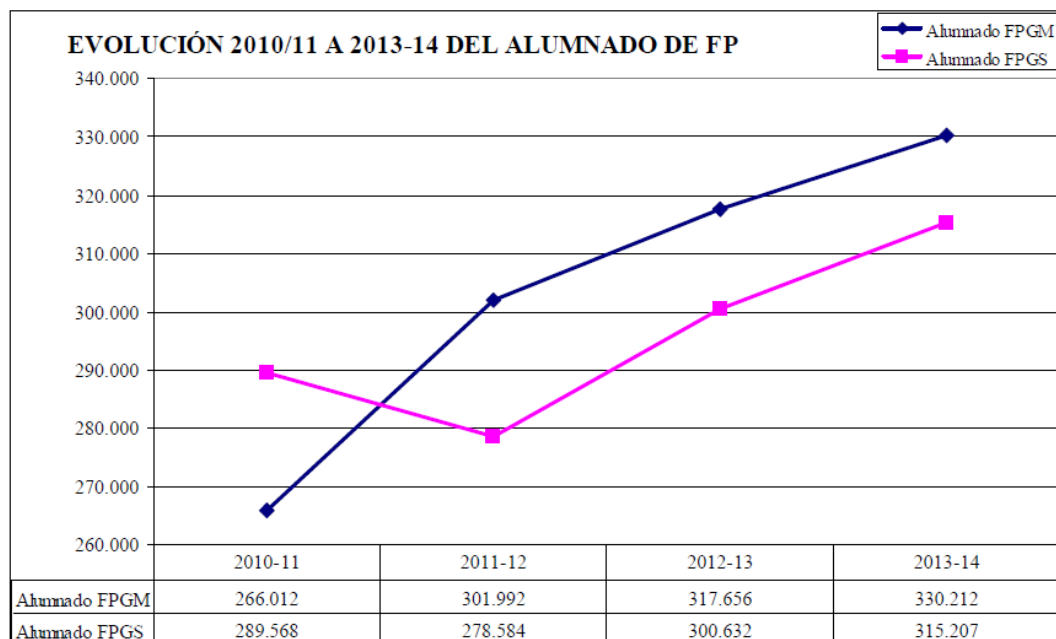
Table B1.4 Pupils enrolled in academic (bachillerato) and vocational (CFGM) upper secondary education, in Spain

	2009-10	2008-09	2007-08	2006-07	2005-06	2004-05	2003-04	2002-03	2001-02
CFGM	271.990	249.506	236.489	232.653	230.174	231.365	229.005	224.486	210.750
Bachillerato	650.563	629.247	622.133	630.349	640.028	646.174	657.400	679.773	727.532
Total	922.553	878.753	858.622	863.002	870.202	877.539	886.405	904.259	938.282
% CFGM/Total	29,5	28,4	27,5	27,0	26,5	26,4	25,8	24,8	22,5

Source: Elaboración propia a partir de Ministerio de Educación. Estadísticas de la Educación no universitaria.

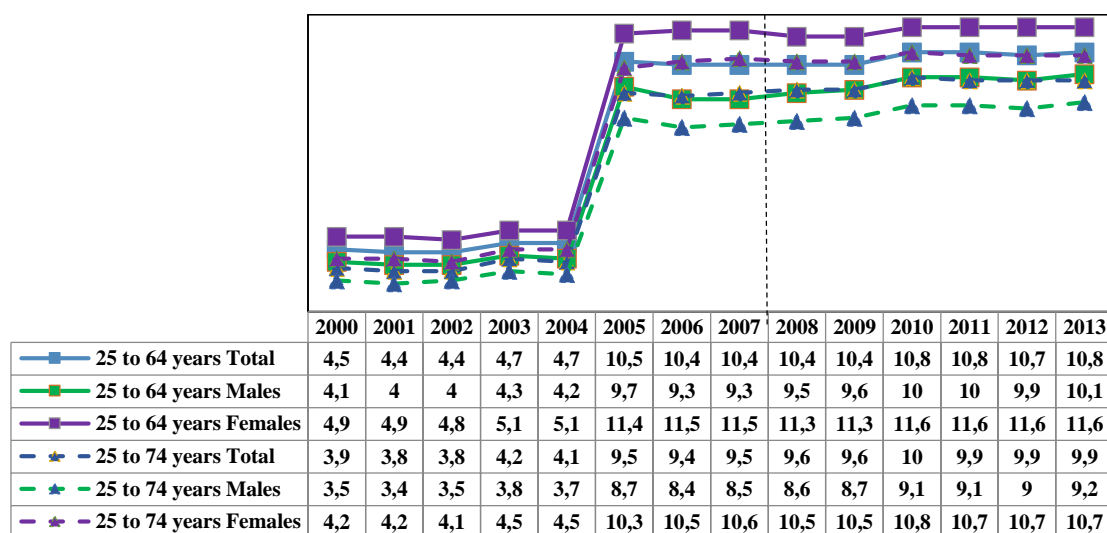
Taken from Rahona, Marta (2012) “Capital humano, abandono escolar y formación profesional de grado medio en España”, *Presupuesto y Gasto Público* 67/2012

Figure B1.6 Vocational education, 2010-2013.



Source: http://www.educcoo.es/images/doc/FP/20131007CCOO_Informe%20FPEstatatal.pdf

Figure B1.7 Participation rate in education and training, by sex and age, in Spain (2000-2013)



Source: Eurostat

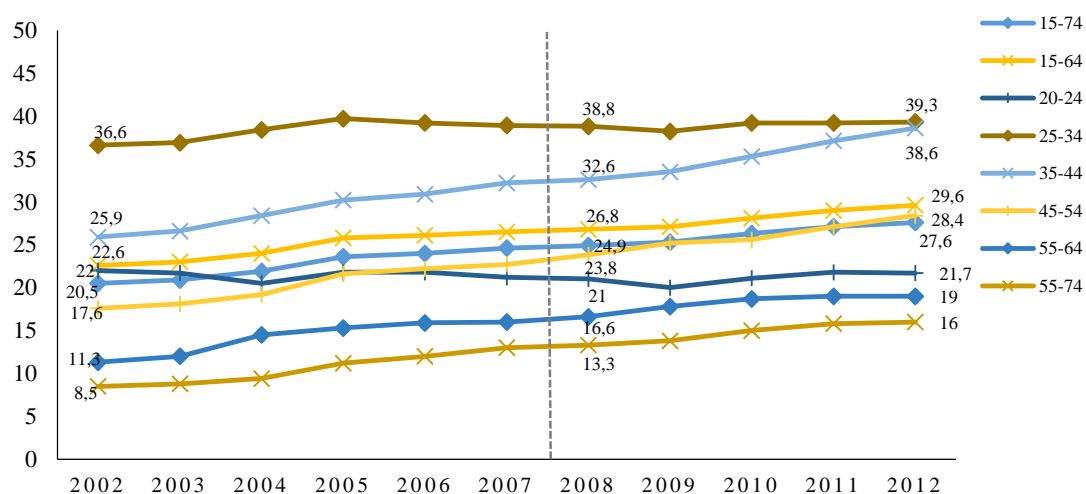
Higher education system in Spain

Higher education comprises university education (in which around 1500000 students are enrolled) and higher vocational education.

Spain is characterized by a model of educational administration that is decentralized and distributes competences between the National Government, the Autonomous Communities and the universities. State laws set out the competence framework of these three actors and allows the Autonomous Communities to develop their own regulations on education.

The Spanish university system is regulated by the Organic Law 4/2007, amending the Organic Law 6/2001, on Universities (LOMLOU) and the Royal Decrees that develop aspects regarding the competences of the National Administration.

Figure B1.8 Percentage of total population aged between 15 and 74, with tertiary attainment, in Spain (2002-2012)



Source: Eurostat

The National Government exercises the competences that ensure the consistency and uniformity of the education system. On the other hand, the Autonomous Communities have competencies for the creation, modification and elimination of programs, in both the public and private universities, and also for the core funding of public universities.

In the academic year 2010/2011, almost one and a half million (1,445,392) students were registered at Spanish universities (87.8% of them at public universities and the rest at private universities). The number of academic staff in the year 2009/2010 was 110,287 members.

Table B1. 5 Academic staff and administrative and service staff (P.A.S.) at universities. Academic year 2009/2010.

University type	Academic staff	P.a.s.
Public universities		
Civil servants	50,905	31,562
Non-civil servants	49,695	22,235
Private universities	9,687	6,065
Total	110,287	59,862

Source: ?

Currently there are 79 universities in Spain, 50 public universities (48 depending on the Autonomous Communities and other 2 directly dependent on the Ministry of Education, Culture and Sport) and 29 private universities.

Table B1. 6 Evolution in the number of universities

University type	1985	2005	2012
Public universities	30	50	50
Private universities	4	23	29
Total	34	73	79

Source: ?

The Spanish government has reduced scholarships for Erasmus students by 50 per cent, suspended loans to students, increased tuition fees, and set up new administration fees for students to pay universities.

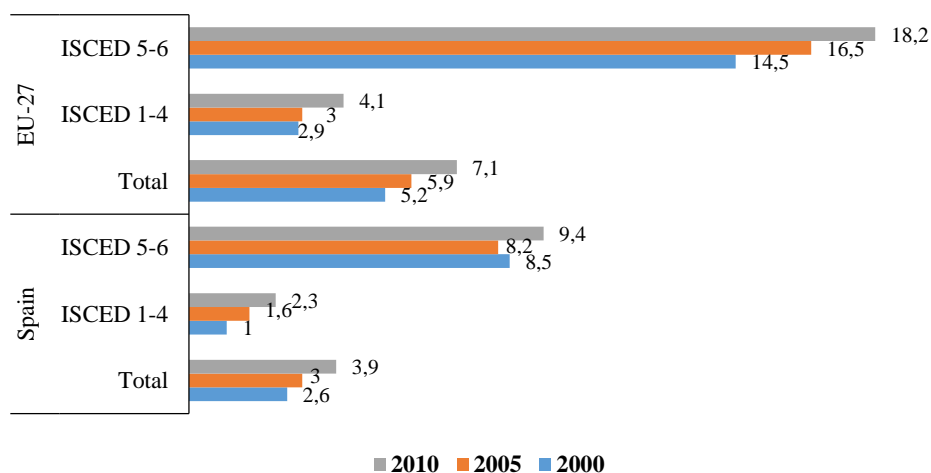
The cuts that hurt the students at university come at a time when the outlook for students that leave university is even worse.

Those that do find jobs, make do with work that does not use their skills, giving rise to the term ‘mileuristas’: Educated Spaniards who can’t earn more than 1,000 euros a month. These mileuristas are starting to look further afield.

Under the 2013 budget, funding for universities has been cut by 18 percent and research funds by 80 percent.

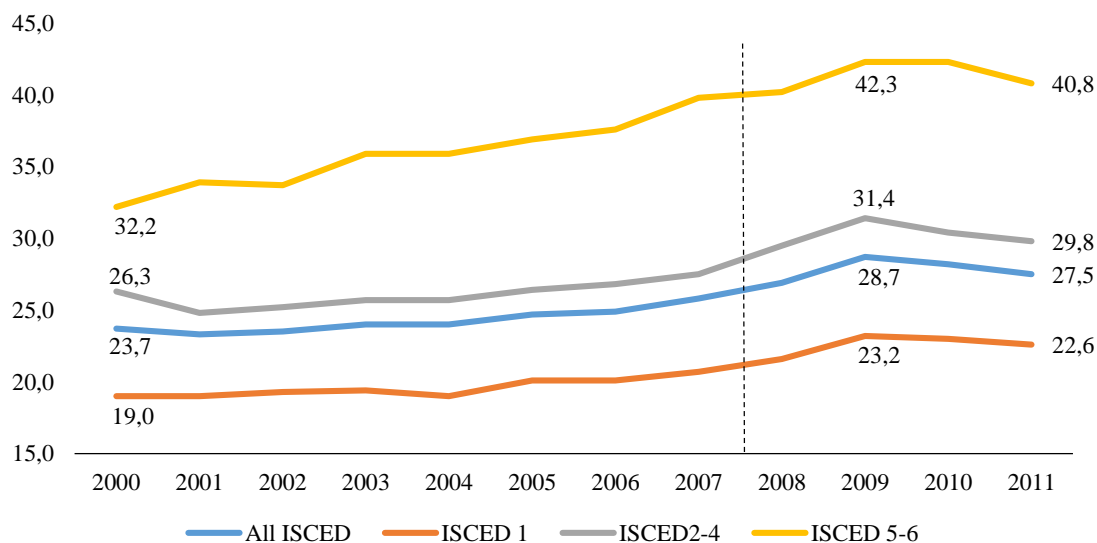
Annexes

Figure B1.9 - Financial aid to pupils as % of total public expenditure on education, by ISCED level, in Spain and EU-27 (2000-2010)



Source: Eurostat

Figure B1.10 - Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents, in Spain (2000-2011)



Source: Eurostat

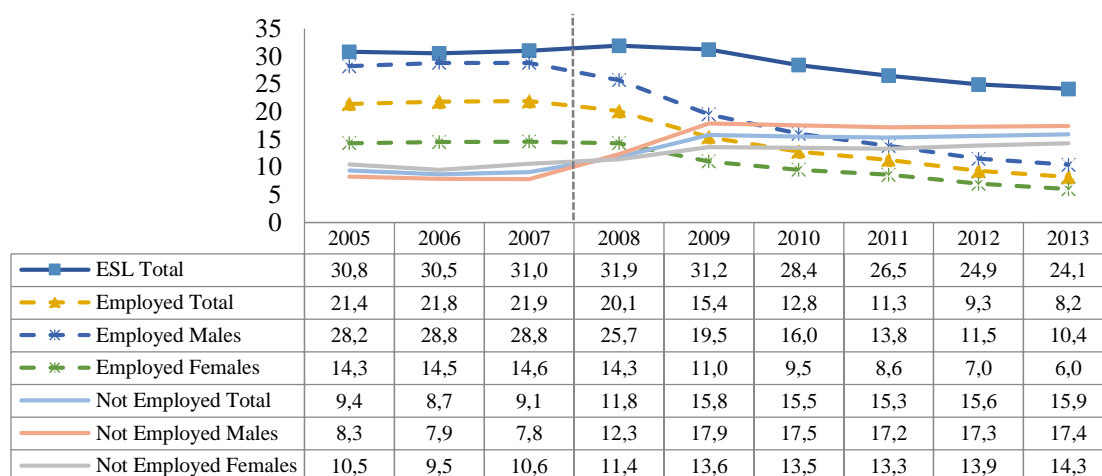
Table B1.7 - Pre-School Enrolment - Pre-primary education (level 0), % in relation to the same age total population and in relation to the same age total population

% In relation to the same age total population						
	4 years		5 years		6-7 years	
	2000	2012	2000	2012	2000	2012
Total	99	97	100,9	97,6	0,1	0,4
Males	98,8	96,7	100,9	97,3	0,1	0,5
Females	99,3	97,3	100,8	97,8	0,0	0,4

% In relation to total students enrolled						
	4 years		5 years		6-7 years	
	2000	2012	2000	2012	2000	2012
Males	51,2	51,4	51,4	51,4	66,5	57,4
Females	48,8	48,6	48,6	48,6	33,5	42,6

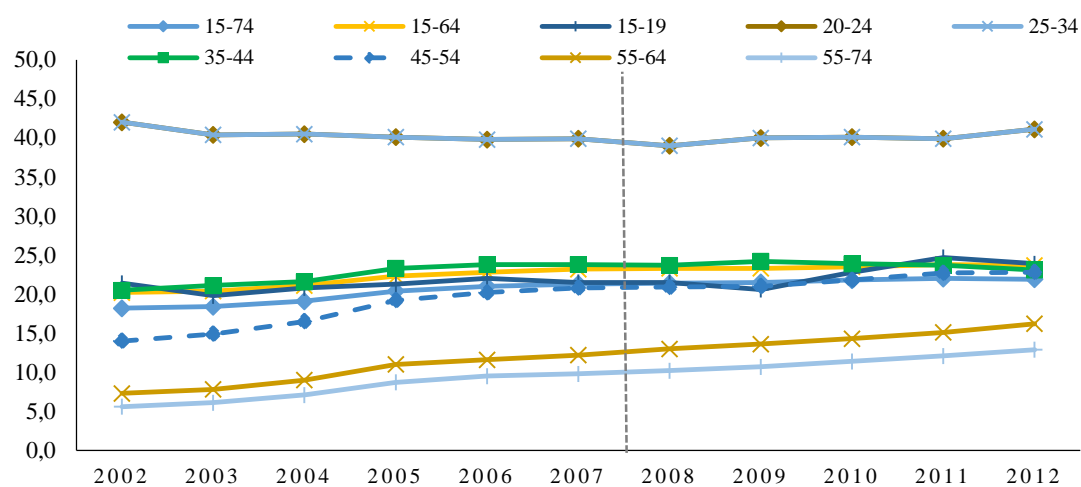
Source: Eurostat

Figure B1.8 Early School Leaving by gender and labour status (%), in Spain



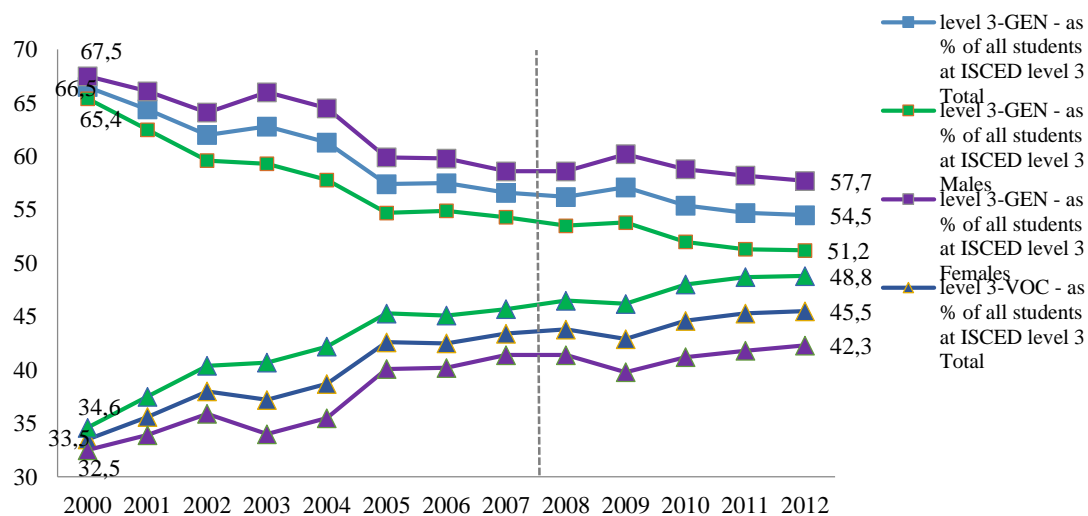
Source: Eurostat

Figure B1.11 Percentage of total population aged between 15 and 74 with Upper Secondary and Post-Secondary attainment, in Spain



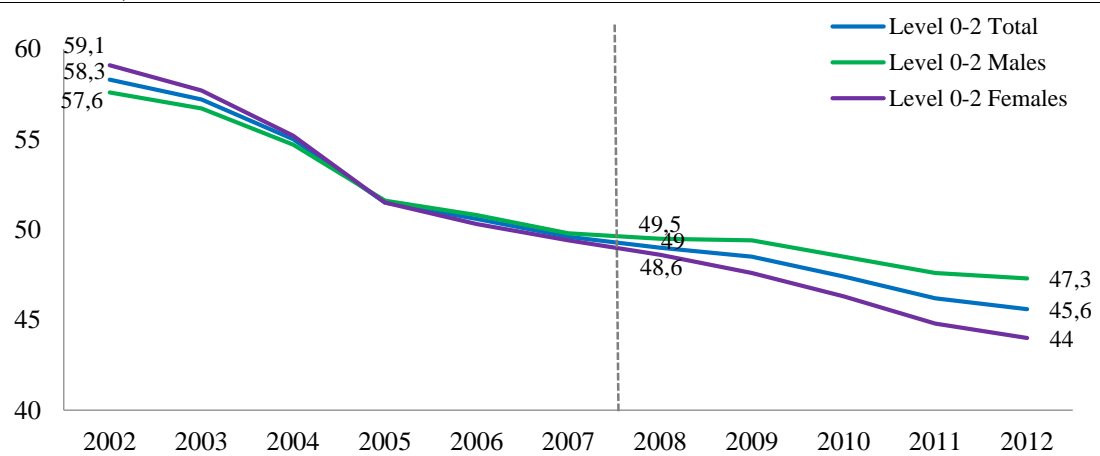
Source: Eurostat

Figure B1.12 Participation/ Enrolment in education, by sex, of students at ISCED level 3-GEN - as % of all students at ISCED level 3, in Spain



Source: Eurostat

Figure B1.13 Percentage of population aged 25-64 below secondary attainment, in Spain (2002-2012)



Source: Eurostat

B2. Final notes on equity and quality

It is obvious that cutbacks are hurting people from low socioeconomic status. Fewer grants, less compensatory education, increasing levels of poverty is equivalent to reduce the opportunities for less advantaged students. Quite likely it will take several years to notice the effects of such cutbacks.

The reforms aimed at improving education quality in Spain are being implemented at the same time as massive cuts in education and other social services by the conservative government are under way. These cuts, which are being applied twofold in the autonomous communities governed by conservative parties are moving Spain drastically away from the models of international educational excellence because they mean less resources for education and an increasing reduction in the state's responsibility for providing universal quality education.

In reality, the Minister's attempts to combine severe cuts with plans that are supposedly aimed at "improving education quality" amount to, to put it nicely, an impossible equation. The prevailing economic and social adjustment programs are creating new problems and challenges for the Spanish education system.

Key Facts for Spain in Education at a Glance 2014

Table	Indicator	Spain		OECD average		EU21 average		Rank among OECD countries and partner countries*
Educational Access and Output								
	Enrolment rates	2012	2005	2012	2005	2012	2005	
C2.1	3-year-olds (in early childhood education)	95%	95%	70%	64%	79%	73%	5 of 37
	4-year-olds (in early childhood and primary education)	97%	99%	84%	79%	89%	84%	9 of 38
C1.1a	5-14 year-olds (all levels)	98%		98%		98%		27 of 44
	Percentage of population that has only attained below upper secondary education	2012	2000	2012	2000	2012	2000	
A1.4a	25-64 year-olds	45%	62%	24%	34%	23%	34%	5 of 36
	Percentage of the population whose highest level of attainment is upper secondary education	2012	2000	2012	2000	2012	2000	
A1.4a	25-64 year-olds	22%	16%	44%	44%	48%	46%	34 of 37
	Percentage of population that has attained tertiary education	2012	2000	2012	2000	2012	2000	
A1.3a A1.4a	25-64 year-olds	32%	23%	33%	22%	29%	20%	21 of 37
	25-34 year-olds	39%	34%	40%	26%	37%	24%	22 of 36
	55-64 year-olds	19%	10%	25%	15%	22%	14%	24 of 36
	Entry rates into tertiary education	2012	2000	2012	2000	2012	2000	
C3.1b	Youth expected to enter tertiary-type A programmes before turning 25	45%	m	48%	m	48%	m	19 of 35
	Graduation rates	2012	2000	2012	2000	2012	2000	
A2.2a	Percentage of today's young people expected to complete upper secondary education in their lifetime	93%	60%	84%	76%	83%	77%	9 of 29
A3.2a	Percentage of today's young people expected to complete university education (tertiary-type A) in their lifetime	29%	29%	38%	28%	38%	27%	21 of 27
Economic and Labour Market Outcomes								
	Unemployment rate of 25-64 year-olds - Men and Women	2012	2008	2012	2008	2012	2008	
A5.4a	Below upper secondary	31%	13%	14%	9%	17%	10%	2 of 35
	Upper secondary and post-secondary non-tertiary	22%	9%	8%	5%	9%	5%	2 of 36
	Tertiary	14%	6%	5%	3%	6%	3%	2 of 36
	Unemployment rate of 25-64 year-olds - Women	2012	2008	2012	2008	2012	2008	
A5.4c (Web)	Below upper secondary	32%	16%	13%	9%	16%	11%	2 of 35
	Upper secondary and post-secondary non-tertiary	23%	11%	9%	6%	10%	6%	2 of 35
	Tertiary	15%	7%	5%	4%	6%	4%	2 of 35
	Average earnings advantage for 25-64 year-olds with tertiary education**	2012 or latest year available		2012 or latest year available		2012 or latest year available		
A6.1a A6.1b (Web)	Men and women	141		159		159		25 of 33
	Men	136		164		166		31 of 33
	Women	155		162		160		23 of 34
	Average earnings penalty for 25-64 year-olds who have not attained upper secondary education**	2012 or latest year available		2012 or latest year available		2012 or latest year available		
A6.1a A6.1b (Web)	Men and women	80		78		79		14 of 33
	Men	80		78		80		15 of 33
	Women	74		75		76		20 of 34
	Percentage of 15-29 year-olds neither employed nor in education or training, by highest level of education	2012	2008	2012	2008	2012	2008	
C5.3d (Web)	Below upper secondary	31%	21%	15%	14%	15%	13%	1 of 35
	Upper secondary	20%	13%	16%	14%	16%	12%	9 of 34
	Tertiary	23%	13%	13%	11%	12%	10%	3 of 34

c) Italy

**ECSE Research project: “Educational Challenges in Southern Europe.
Equity and Efficiency in a Time of Crisis” (2013-2015)
University Institute of Lisbon**

Università Cattolica del Sacro cuore, Milan (Italy)

**Research team: Maddalena Colombo (co-ordinator), Mariagrazia Santagati, Marta
Cordini**

Department of Sociology

Contents

LIST OF TABLES AND FIGURES	136
SECTION A: BACKGROUND	138
A1. NATIONAL CONTEXT DESCRIPTION.....	138
Annexes	Erro! Marcador não definido.
A2. EDUCATION SYSTEM CHARACTERIZATION	144
Annexes	Erro! Marcador não definido.
A3. PROCESSES AND MECHANISMS OF MONITORING AND EVALUATING THE EDUCATIONAL SYSTEM	ERRO! MARCADOR NÃO DEFINIDO.
Annexes	Erro! Marcador não definido.
SECTION B: CRISIS IMPACTS IN EDUCATION.....	ERRO! MARCADOR NÃO DEFINIDO.
B1. EQUITY: POLICIES AND ACHIEVEMENTS.....	ERRO! MARCADOR NÃO DEFINIDO.
B1.1 Problems in the access to the educational system	Erro! Marcador não definido.
B1.2 Between access and success. Analysing the participation of specific groups	Erro! Marcador não definido.
B1.3 Contrasting failure and promoting success in education ...	Erro! Marcador não definido.
B1.4 Improving competences of adolescents and adult population	Erro! Marcador não definido.
ANNEXES.....	ERRO! MARCADOR NÃO DEFINIDO.
B2. FINAL NOTES ON EQUITY AND QUALITY: ORIENTATION AND PROCESSES	ERRO! MARCADOR NÃO DEFINIDO.
SUMMARY AND CONCLUSION.....	ERRO! MARCADOR NÃO DEFINIDO.
REFERENCES.....	ERRO! MARCADOR NÃO DEFINIDO.

List of tables and figures

Tables

A1. National context description

Table A1.1. Gini Coefficient, in UE27 and Italy (2000-2012)

Table A1.2. At risk of poverty rate in Italy, whole population

Table A1.3. Children at risk of poverty rate in Italy

A2. Description of the educational system

Table A2.1 Private and public schools from pre-primary level up to the upper secondary level in Italy, by territorial distribution (2012/13)

Table A2.2 Percentage variation of public and private schools per level (2010-2013)

Table A2.3 Teachers and academic staff per levels (2000-2011)

Table A2.4 Teachers per age groups and levels

Table A2.5 Students enrolled into the Italian education system (2000-2012)

Table A2.6 Foreign students enrolled in ISCED 0 – ISCED 3 (2010-2012)

Table A2.7 Students with disabilities per regional area and kind of dependency (2013/14)

A3. Processes and mechanisms of monitoring and evaluating the educational system

Table A3.1 Classes and students participating to INVALSI tests in 2014

Table A3.2 IEA tests and INVALSI tests per grades in 2013/14

Table A3.1. Number of students entitled to the scholarship and beneficiaries (2001/02 - 2010/11)

B1. Equity: Policies and achievements

Table B1.1 Number of students entitled to the scholarship and beneficiaries (2001/02 - 2010/11)

Table B1.2 Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita

Table B1.3. Incidence percentage of Pupils with Non Italian citizenship (NIC) and native born in the Italian school system

Table B1.4 Pupils/students at risk of dropping out (% of students among those attending different scholastic level), (2011/12)

Table B1.5 Successful students (per 100 students assessed) with Italian and non-Italian citizenship, by school level, (2001//02 - 2012/13)

Table B1.6 Italian and foreign students in the various types of secondary school, (2002/03-2012/2013)

Table B1.7. Retention rate

Table B1.8. Population with the upper secondary attainment (%)

Table B1.9 Population with the tertiary attainment (%)

Table B1.10 Percentage of population aged 25-64 below secondary attainment

Table B1.11. Percentage of population aged 25-64 below secondary attainment

Table B1.12 Percentage rate in education and training (last 4 weeks)

Table B1.13 Mean score in reading, mathematics, sciences per gender and migration status, Italian students, in Pisa OECD (2000-2012)

Figures

A1. National context description

Figure A1.1 Unemployment rate by age and gender in Italy (2000-2013)

Figure A1.2. Employment rate of population by age range and gender, in Italy (2000-2013)

Figure A1.3 Rates of early drop outs and NEET by parents' level of education

A2. Description of the educational system

Figure A2.1 Percentage of students with disability per level and scholastic year

Figure A2.2. Enrolled students in private and public universities in Italy (total and first cycle), (2003/04-2012/13)

Figure A2.3 Foreign enrolled students in Italy (2003/04-2012/13)

B1. Equity: Policies and achievements

Figure B1.1 Financial aid to students as % of total public expenditure on education, for all levels of education

Figure B1.2 Incidence percentage of children with disability (%)

Figure B1.3 Specialist teachers (var. % from 2003/04 to 2012/13)

Figure B1.4 Early School Leaving Rate

Figure B1.5 Retention rate (per 100 students assessed) by type of upper secondary school, (2001/02 – 2008/09)

Figure B1.6 Population (25-64 years) below secondary attainment

Section A: Background

A1. National context description

General overview. Italy is recognised as one of the 8 most industrialized countries in the world but its recent trends are strongly declining as a consequence of the economic stagnation and financial crisis. Its main characteristics, in the social, economic, and cultural domain, are currently as follows:

- A considerable level of GDP procapite on average but a high degree of sperequation between the employed population and the under- or unemployed ones; and between Northern-Central and Southern-Island regions.
- A demographic decline, lasting since the Eighties of the XXth Century.
- A great gender disparity in both the access to work and the average salary, where women are more excluded and poorer than men.
- Conversely, in Italy women hold on average higher levels of education if compared with men.

Educational and occupational levels of the population. The economic and financial crisis outburst in 2008 contributed to worsen the already existing social inequalities that affect the occupational and educational system in Italy. This makes : gender differences, territorial divide, youth unemployment, difficulties in transition from school to work and NEETs rates more serious. The unemployment rate clearly shows the crisis' effect. It increased from 6.8% in 2008 to 12.4% in 2013, overpassing the value registered in 2000 (10.7%) (Figure 1).

As the educational levels, 42.1% of the population between 25 and 64 years attained an upper secondary or post-secondary non tertiary education, while only 16.2% achieved the higher levels of education with a bachelor or a master degree. 25-34 years population shows the highest rates of achievement of tertiary education (22.3%).

Although gender differences are still relevant, women have made faster progress in higher education than men in the last decades: while the proportion of 55-64 year-olds with university-level education is almost equal for women and men, one in four 25-34 year-old women (26%) attained this level of education compared to only one-six men (16%) at the same age.

Despite the increase of qualification, employment rates are lower than the European average: only 62.6% of the Italian population who attained an upper secondary or post-secondary educational level were employed in 2013, showing an employment rate of 5.3 percentage points lower than the European average (67.9%). Even in this case Italian women are less employed than their European counterparts (7.9 percentage points). Thus, considering employment rates, the most affected by the crisis in Italy result to be 25-29 years old males (Figure 2), since they have experienced the most significant decline from 2009, stepping back to the 2003/04 rates.

School to work transitions. The paradox of the Italian labour market, in which a relative scarcity of high levels of education corresponds to low yields, is due to two main reasons:

- 1) small size of Italian manufacturing units and their lacking resources, inconsistent with the levels of investment required for innovation activities (R&D);
- 2) poor quality and credibility of the school system, with weak connections with the job opportunities' system and the labour market's needs.

In addition, the outcome in the labour market confirms that in Italy a university degree does not reduce the risk of unemployment to the same extent as in other European countries (ISFOL, 2012). We can register in general a loss of confidence in the university system: although entry rates into higher education increased in the early 2000s, the most recent data show that part of the increase was only temporary. Based on entry rates observed during the years taken into consideration, the proportion of young people who could be expected to enter a university-level programme during their lifetime increased from 39% in 2000 to 50% in 2002 and 56% in 2006, before dropping back to 48% in 2011 (OECD average:60%).

Also the rates of early school leavers are elevated in Italy compared to the European average: the education cycle terminates after the lower secondary school for 18.2% of young people vs. 12.3% of the young Europeans at the same age (BES Report, 2013). Another phenomenon affecting youth in Italy is the considerable number of NEETs: they increased from 19.5% in 2009 to 22.7% in 2011. Nevertheless, it is important to highlight that 8.8% of NEETs achieved tertiary education and is not likely to enrol in any further training or education activity. More than a quarter of NEETs (28.5%) instead are not currently searching for a job and are not willing to work. Lifelong training and education is clearly needed, especially in the current economic crisis, but its provision has not seen any relevant changes and increase since 2004 (6.4%), on the contrary, data show a slight decrease (5.7% in 2011).

Territorial divide. As mentioned before, the territorial divide remains substantial: considering people with an upper secondary certificate, the Southern regions scores 47%, 9 percentage points below the Italian average (56%). The difference is striking if compared to autonomous province of Trento (65%) (North-East of Italy), which is considered the best performing area in the country as regards to economic performances, social service supply and education standards. The sharper difference in any case concerns the NEET rate: while the rate of young people who does not work neither study in the Northern Italy states at 15%, this rate achieves one third of young between 18 and 25 years old in Southern/Island regions.

Social divide. As one might suppose, in such a landscape of social and territorial disparities, the *social-economic context of origin is still an important factor of influence in the education pathways*. In Italy, parents' education levels seriously affect the chance of success of their children. Students having parents with only the compulsory education report a dropout rate of 27.7%, while it decreases up to 7.8% among those parents who achieved the upper secondary education and up to 2.9% among those families in which at least one parent has obtained an academic degree (Istat, Cnel's BES Report, 2013) (Figure 3). This means that the school is not capable in functioning as an agent fostering social mobility for the more disadvantaged people.

Inequalities in the income distribution have always been more significant compared to the European average: Gini coefficient states at 32.1 in 2012 compare to 30.5 in Europe. This is the same value registered in 2006 and not significant changes occurred according to this indicator. Thus, *income inequality is still relevant*. 19.8% of Italian citizens in 2012 result to be at risk of poverty (17.1% is the Eu-27 average) confirming the value reported in 2007. After 2007 it decreased up to 18.2% in 2010 but then it raised again (table 2). The poverty rate is higher among children: 26.5% in Italy (vs. 21.0 in Europe) and it followed a similar trend to the general risk-of-poverty rate (table 3). This might prove that the *consequences of the economic crisis are likely to be long-term effects that have not yet completely shown so far*.

Education reforms. Over the last twenty years, the Italian education system has undergone a series of transformations or attempts of transformations, at times announced and then abandoned, disavowed or only formally implemented, all in a background of political instability and fragmented policies. Furthermore, ministry office and educational establishments demonstrate a resistance to changes (Bifulco et al., 2010). Since the '90s, reforms targeted in the Italian education system aimed to leading it to processes of: devolution, autonomy of schools (Landri & Grimaldi, 2006), "smooth" privatization, changes in the relationship between education and labour market (emphasizing digitalization, internships, and placement services...) and alignment to international standards, mainly the Eu-countries performativity. One of the main critical issues at stake in these years has been the lack of correspondence (and dialogue) between vocational training and education systems. The reformist trend has been inspired of course also by the European guidelines on education and, financially speaking, draws on resources from the European Social Fund.

We can identify *four reforms, carried out by right and left governments but inspired more or less by the same "neo-liberalist spirit"*, that have directly targeted to the education system recently and represent the milestones of this trend:

- 1) Berlinguer Reform (centre-left government, 1999/2000). This law consists in an attempt of reorganizing school cycles. Compulsory school is extended up to 15 years old and it is introduced the compulsion for the vocational training that lasts until 18 years old. The total number of years dedicated to compulsory education decrease from 13 to 12. Although this law recognizes the value of vocational training and education and aims to strengthen synergies with the Ministry of Work, nevertheless it confirms the sharp distinction between regional vocational training and education provided at national level.
- 2) The 2001 reform of Clause V in the Constitution (centre-left government of Prodi) tried to reset competences and powers between State and Regions, by introducing the principle of “subsidiarity”. Minister Moratti aimed also to reformulate the relationship between education and professional training. With this law, “education” is entrusted to the integrated legislations of State and Regions (except for the general norms and fundamental principles which remain the exclusive prerogative of the State) and “professional training” under the exclusive legislation of the regions, except for the LEP (essential levels of services), which belongs exclusively to the State (Bifulco et al. 2010). More power is given to Regions: they are no more simply services providers, but they acquire a decisional task as well (Campiono, 2009). This reform aimed at:
 - a) Saving the vocational training from being merged with the technical training;
 - b) Giving major dignity to regional vocational training courses;
 - c) Fighting the early school leaving.

This reform was not supported by adequate funding, especially in some Central and Southern regions. This has amplified the North/South divide as a result. In addition the work world acquired through this reform an important role in organising training activities through the internship, taking advantage from flexible contracts, without being required for more innovation.

- 3) Gelmini Reform (centre-right government, developed in two phases: 2003 and 2008). This reform led to a simplification of the upper secondary cycle and a reduction of the curricula variety, as well as the reduction of the school time (from 34-40 hours per week – according various school programs - to 32 in any courses). In the tertiary cycle it introduced the chance of splitting the tradition 5 year cycle in one 3 years cycle, after which students can obtain a bachelor degree, and in 2 years “specialized courses” or 1 year master. It introduced also the possibility of transforming universities in private foundation and it seriously affected the governance and the structure of the Italian university system. Various disposition concerned the teaching staff. The reform implied a serious resizing of the educational offer of public universities and especially a set of significant financial cuts.

- 4) The lengthening of compulsory education's act, which has been a matter for a long "ideological struggle" between opposite views of the Education for all principle²¹. In 1997 the Berlinguer Reform raised the *obligation of schooling* from eight to nine years (and from 14 to 15 years became the minimum threshold for school leaving), then it was abolished in 2003 by the Moratti Reform (centre-right government). Minister Moratti stated the duty of education for at least 10 years, on which basis pupils could attend—immediately after lower secondary school—either upper secondary school or vocational courses, instead of the obligation to attend at least one year of upper secondary school as required by the Berlinguer reform. Moratti reformulated also the concept of obligation as "duty and right (*diritto-dovere*) of education or vocational training". The political change occurred in 2006 made it possible to re-introduce by Fioroni (centre-left majority) the principle of *compulsory education* (but not more "compulsory schooling") in the 2007 Financial Law. Currently Italian pupils – so to correspond to ongoing compulsory education rules - must attend an education or a VET course for at least 12 years and not leave the formation system before 16 years. They also have the right to get free education or VET by 18th year.

In spite of all these reforms, on the one hand, and the strong territorialisation and regionalization of policy system, on the other hand, the Italian education system still features Regions and local authorities with limited power. The central level reveals a loss of deliberative power and responsibility, so risking to leave local actors without relevant guidelines useful in defining priorities and directions. Yet *the system remains centralist* over two issues of fundamental importance: personnel management totally financed by the State (it covers 80% of the total spending on the education system) and the allocation and management of other financial resources. As a matter of fact, the process of decentralization lies substantially incomplete. The result is a fragmented policy landscape and ever-increasing inequalities in the welfare system (Bifulco, Bricocoli, Monteleone, 2008).

Public spending for education. Spending per student in primary and secondary schools has remained still for the past 15 years, increasingly by only 0.5% in real terms between 1995 and 2010. *Italy is the only OECD country that did not increase spending per student in primary and secondary education since 1995* (OECD, 2013). Between 2005 and 2011 Italy produced savings in primary and lower secondary education by increasing the number of students per teacher. Average class size increased as a result; in addition, Italy moved the student/teacher ratio closer

²¹ See the comment *The Education Warfare (1994-2010)* at: <http://strugglesinitaly.wordpress.com/reappropriation/en-the-education-warfare-1994-2010>.

to the international average by moderately increasing yearly teaching time for teachers, and by simultaneously reducing students' instruction time.

Crisis effects. According to several authors (i.e. Landri, 2009), so far the so called “neo-liberal turn” concerning welfare policies (including education policy) did not benefit neither in terms of protection and jobs creation nor in term of equality. On the contrary one can observe in Italy new kinds of poverty, impoverishment of middle class, increasing of families with young members at risk of poverty, cuts to the public expenditure for education, low quality of basic learning of 15 years old (OCSE-PISA, 2014) and low proficiency of adults (OCSE-PIAAC, 2014), reduction of entries into the education system and of the willing to learn or being educated.

Because of the crisis, data shows persisting high rates of early school leaving or delay rates, an increasing of NEETs, a territorial divide between North and South (the latter significantly underdeveloped with regard to all indicators), a major disparity in school results, that still depends greatly on the cultural and economic capital of the family, and – last but not least - a low efficacy of the school-work transition measures (Istat, 2013). Nevertheless, according to data, *Italian education system seems to react with unexpected resilience*, enduring in offering equal access and opportunities, moderating inequalities through the supply of second chances, gradually conforming to the European and international scenario (computerizing, accountability, self-evaluation instruments...). Against a sharp reduction of the public expenditure for education (from 25.8% of GDP in 2008 to 24.5% in 2010 for all levels – Eurostat), schools prove a capability for answering to general and specific demands concerning education. The rate of disabled student has increased, as well as the rate of non-Italian citizen students, processes of de-segregation are operating, the rate of 30-34 years old population with Isced 6 passes from 15.6% in 2004 to 21.7% in 2012.

A2. Education system characterization

Tracks. Since the last extension act by Minister Fioroni (December 2006) compulsory education lasts ten years (up to 16), including the whole first cycle (ISCED 1-2: primary school 6-11 years old, and lower secondary school (11-14 years old) and the first two years of the second cycle (ISCED 3), to be done either in an upper secondary school or in a three or, exceptionally²², in a four year vocational training course (Cedefop, 2012). As aforementioned (see A.1 section), according to the law everyone has the right/duty to pursue education and/or training for at least 12 years in the national education or in the “IeFP system” (*Istruzione e Formazione Professionale*): this is the dual tracking. In the first case one gets at the end of this pathway a five year State diploma (being 19yrs old), while in the IeFP one can get a three/four years vocational qualification or diploma, even before reaching 18 years of age.

Primary school lasts five years while lower secondary school lasts three years and it ends with a tracking exam. The second cycle of education (ISCED 3) lasts 5 years or 3-4 years in education and vocational training courses and it implies a final tracking exam in order to obtain a school-leaving certificate (*State diploma or Regional qualification*).

Post-compulsory education begins offering three options:

- 1) Higher Technical Institutes (ITS 1 or 2 years courses) that provide post-diploma/post-vocational qualification. They enroll especially young unemployed people holding an upper secondary diploma;
- 2) Higher Technical Education and Training (IFTTS courses), lasting up to 1 year, especially addressing young unemployed people holding a 3-4 years vocational training and education diploma.
- 3) University and Tertiary non-academic higher education courses (i.e. Arts and Music education) that comprise two cycles: a 3 year course leading to a bachelor degree, followed by one year leading to a first level graduate diploma (*laurea triennale*) or a specialization degree, followed by a two year course leading to a Master’s degree (*laurea magistrale*)²³.

Actors involved in the governance of the Italian education and vocational training system are the following:

²² “Exceptionally” means that this kind of offer is not widespread in Italy but is limited to a short range of regions/province, such as Lombardia, Piemonte, Liguria, Friuli Venezia Giulia, Sicilia and Province of Trento and Bolzano. Three years VET courses (the so called IeFP system) have been settled by the law n.53 (2003), the Moratti Reform, and supported by Ministry of Education joint with Regional councils, according to the State-Regions agreement that was subscribed in 2003, June 19th.

²³ See the diagram in the ANNEX 1_A.2 for further details on the whole education system. The present list does not include Doctorate and High specialized courses provided by Universities.

- Ministry of Education, University and Research (MIUR) that is responsible for setting the minimum public service performance levels for the education system;
- Ministry of Labour and Social Policies (MLPS) that is responsible for setting the minimum public service performance for the vocational training system;
- The Regions and Autonomous Provinces that are the administrations in charge of planning, organizing and supplying VET. Provinces and regions hold the property of school establishments and provide for their current maintenance.
- Several social partners (such as: municipalities, network of local communities, trade unions, enterprises associations, ...) that contribute to designing and organizing active labour policies and particular VET policies.
- Autonomous schools. By the law n.59 / 1997 schools got the administrative and didactic autonomy under the management of the principle. They cannot deliberate for the workforce employment, that is engaged directly by the State.

Schools offer. The education system in Italy includes 56.631 schools (2012/13), either public or private. Private schools represent almost a quarter (21.4%) of this whole. The private sector is more relevant among pre-primary schools (34.3% out of the total offer and 72% of the private supply) and upper secondary schools (23.2% out of the total offer and 13% of the private supply) (Table 1). According to the available data (Table 2), since 2010 public schools, from pre-primary to upper secondary level, have diminished by 0.9%²⁴, while private schools increased by 2.1%. Variations have been slightly different according to the levels. Among public schools upper levels have increased, as lower and upper secondary schools (+2.7% and +2.0%), while pre-primary and primary schools have diminished by 1.4% and 2.8%. Among private schools, the increase is meaningful in all levels, growing less in the pre-primary (+0.5%) than in the lower secondary (+4.7%) and upper secondary (+10%).

Staff. The Italian education system employs more than 800.000 teachers and professors (Table 3). Almost one-third (28.5%) of this staff is employed into primary schools and more than a quarter (26.3%) in upper secondary ones. The lower secondary level employs 19.8% of the teaching population²⁵ instead. During the considered period (2000-2012) the number of teachers has known various fluctuations: it has increased by 3% between 2000 and 2004, then in 2005 it drops by 70.600 units (-7.8%). Afterwards the number of teachers and academic staff increased again until 2009 by 5.9% and then it decreased once again (-8.2%).

²⁴ The latest Miur statistical document (Miur, 2014, p. 4) shows how the public school provision has furtherly decreased in the last 2 years: in 2014/15 only 41.383 schools are counted instead of 44.485 in 2012/13.

²⁵ Data updated to 2011.

The only level that has reported an increase in the number of employed teachers in 2011 compared with the previous years is the primary education one with 2.000 new entrants (+ 2.5%). On the contrary, all others levels show a decrease, particularly relevant concerning the upper secondary level (-5.4%). Considering all levels, teachers and academic staff have diminished by 7.7% in the last ten years.

As regards gender, the Italian teaching staff are strongly unbalanced in favour of women. In compulsory schools females are overrepresented among teachers: 95.9% in the primary schools, 77.7% in the lower secondary schools and 63% in the upper secondary education level (Eurydice, 2013).

The national school staff are also unbalanced according the age classes: on the whole, the majority of teachers are older than 50 years, while only 0.5% are younger than 30. Moreover teachers aged between 30-39yrs are only 16.6% in the primary school and only 9.5% in the lower and upper secondary schools (Table 4).

The teaching activity is regulated at a national level for all the public establishments, whereas each private institute can issue singular job contracts with the teaching staff. According to the public contract, teachers dedicate to teaching activities 20.7 hours per week on average; this amount of hours changes according to levels: 25 hours in pre-primary schools, 22 hours in primary schools, 18 hours in lower secondary and upper secondary schools. During the financial crisis nothing has changed in the weekly engagement of teachers; only the extra-ordinary (additional) charges (i.e. special responsibility, co-ordination of team work, document preparation, extracurricular activities, etc.) have been reduced for the lack of extra-budget available in each school (Eurydice, 2013, p. 44).

The average annual gross salary for teachers depends on the level of education they are employed into: pre-primary and primary teachers earn on average 27.128 euro per year, lower secondary teachers earn on average 19.082 per year and 30.341 is the average gross salary of an upper secondary teacher. School heads, instead, earn 62.488 euro per year in each level²⁶ (Eurydice, 2013).

Pupils. Students enrolled in scholastic system from pre-primary schools up to upper secondary school are 8.961.159 in 2012. A quarter of them (31.5%) are attending primary school and another quarter (29.6%) are attending upper secondary school.

The gender distribution is quite balanced, since female students represent 48.4% out of the population attending school up to upper secondary level.

²⁶ Data in salaries are taken from the National Collective Contract and are referred only at the fixed part. Each school head can earn a variable amount in addition, according to the school's size, the school location (i.e. there are additional budget for Schools participating in so-called 'disadvantaged areas' projects, which is autonomously allocated between all involved teachers and administrative staff).

As to the variation, during the ten years taken into consideration (2000-2012) the student population has increased by 1.7%, but this is the result of different and alternative dynamics: the most significant increase is observed in pre-primary schools (+7.7%), due to the openness of infant school to early ages (from 18 to 36 months) by the law n.30/2003 and the following ministerial dispositions (since s.y. 2005/06) (Colombo, 2013). Even the upper secondary schools have witnessed a significant increase (+2.5%). On the contrary, primary and lower secondary schools are affected by a decline in their attending population (-0.6% and -1.2%), mainly due to general infertility and the birth rate collapse from 2005 to 2009, only weakly restored in the following years (2010-2012).

Compared to the previous year, 2012 shows a clear decrease of -2.8% out of the whole student population. This decrease has been particularly relevant concerning upper secondary schools (Table 5).

As regards the pupils citizenship, 8.4% of students are non-Italian citizens (Miur, Fondazione Ismu, 2014): they represent more than 9% of the student population in all levels apart from the upper secondary one, in which their presence states at 6.2% (2012/13). The last national report on Migration in Italy states there has been a rapid and exponential increase of foreign students in the last decade, whose incidence rate has grown intensively not only for the long term effects of international migrations, but also for the reduction of native pupils (Santagati in Cesareo, 2013). According to Miur (2014), the disadvantaged part of the student population has grown even more since 2007/08, reaching the total amount of 210.929 in s.y. 2014/15. This is due to a range of factors: a) the increasing capacity of teachers and sanitary staff to detect learning failures and personal diseases in an early stage of school attendance; b) the increasing acceptance by parents of disadvantaged pupils to be labelled as “special needs” children and families and, thus, to be helped in coping with school failures and learning difficulties, especially after the law n.170/2010 was promulgated²⁷; c) the tendency of some schools, particularly if located in disadvantaged areas, to enlarge their “special needs” population so as to acquire funding, resources, and facilities in addition addressed only to this target.

The more recent data issued by Istat (2014), students with disabilities in the compulsory education are more than 150.000, whose 56.6% in primary school and the rest in the lower secondary school (year 2013/14). They have increased by 1.000 students since last year, confirming a trend registered in the last ten years. They represent 3% of the student population in primary school and 3.8% in lower secondary school. Referred to the previous scholastic year (2011/12), Miur registered in upper secondary schools 1,9% of incidence rate of disable students (Miur, 2013, p.5).

²⁷ Law n. 170 /2010 established the right of pupils with learning difficulties – such as: dysgraphia, dyslexia, ADHD syndrome, etc - to have special measures of facilitation, compensation or dispensation in the ordinary school programs.

Males represent more than 60% of students with disabilities. Some important territorial differences exist: a more significant presence of disabled students is reported in Southern Italy regardless the type of disability (Table 7). Regions with the higher incidence rates of disabled students are: Trentino Alto Adige (north-east) (3,3%), Lazio (3%) (centre), Abruzzo (2.9%) (south) and Sicily (2.6%) (island) (Miur, 2013, p. 7).

In primary and lower secondary education, teachers dedicated to students with disabilities (called “supportive teachers” - *insegnanti di sostegno*) are more than 74.000 and they are increased by 6.000 units compared to the previous year (Istat, 2014) notwithstanding the post-crisis financial cuts. In s.y. 2013/14 the public sector enrolls 110.216 “supportive teachers” in all the school levels, which represent 12,8% out of the whole teaching staff (Miur, 2014, p.10), almost one “supporter” per 2 students with disability (209.814 is the number of students with disability in the public school system).

Higher education. This sector of the education system is dominated by a prevailing offer of university courses, instead the vocationally-oriented courses are supplied a lot less. This is one of the reasons why Italy scores low rates of tertiary education attainment (22.4% of the 30-34 yrs. Population vs. the Eu average 37% in 2013) (Eu DG education and training, 2014).

Most of the existing university institutions were established directly by the State, while a limited number, originally set up by private initiatives, were later recognized by the Ministry of Education, University and Research (MIUR).

MIUR shapes the regulatory framework of the Italian higher education system, well supported by some advisory authorities such as the National University Council, National Agency for the Evaluation (ANVUR), the Conference of Italian Universities (CRUI) and the University Students National Council (CNSU). According to the title 33 of the Italian Constitution, universities are allowed to perform autonomously within a regularized framework defined by the national law.

The Italian university system in the academic year 2013/14 consists of 96 institutes among which 67 are state universities, 29 are non-state universities legally recognized, whose 11 are on-line universities (Anvur, 2014, p.258). Large majority of students is enrolled into a public university (92%), while only 8% attends a non-state university (whose 2.6% is enrolled into online institutions). Considering the size of university branches, we have 11 universities with more than 40.000 enrolled students, 30 medium sized (between 40.000 and 15.000 students) and 48 small universities with less than 15.000 enrolled. In 2013/14 Italian universities offer 4.662 courses. The offer has reached the maximum in 2007/08 with an amount of 5.879 courses, also as a consequence of the introduction of 3+2 cycles. Afterwards, because of the financial crisis, the governmental guidelines required a rationalization of the offer that has led to a reduction of 1.217 courses (-20,7%) (Anvur, 2014, p.260).

The academic year 2012/13 registered 228.261 students enrolled in the first cycle of the tertiary educational level in private and public university (*three years bachelor degree*). This number has decreased by 28,8% since 2003/04: after a considerable decrease of -14% in 2006/07 it kept diminishing up until now confirming the loss of confidence into the Italian higher education system. In the last year (2013) the enrollments decline occurred in almost all the academic sites, apart from those located in the North-West where students enrolled have increase by +4.1% and the new enrolled by +1.3%. In the North-East the collapse has been modest, but even significant: -2.3% students enrolled and -5.9% newly enrolled. In the Centre of Italy the total amount of students fell by -12.1% and the number of new students enrolled by -18.3%. The greatest loss of enrollments occurred in the Southern and Island universities, with a decrease of -11.6% among the whole enrolled population and - 22.5 % of newly enrolled students (Censis, 2014).

Considering the total offer of the tertiary system (including specializations, masters, and 4 or 5 years courses), students enrolled in the academic year 2012/13 were 269.518. Also the general data confirms the negative trends of entries in the university system: since 2003/04 the total amount of students has decreased by 20.4% (Figure 2). According to OECD, “between 2008 and 2012, rates of entry into university programs fell significantly in Italy. If current patterns persist, 47% of today’s 18-year-old can be expected to enter tertiary programs in their lifetime, down from 51% in 2008 and significantly less than the average entry rate in the OECD countries: 58%” (OECD, 2014, p.2).

An opposite trend can be observed among the foreign population that has increased by 42.3% since 2003/04 to 2012/13, passing from 9.195 university enrollments to 13.081 (Figure 4).

Adult Education. Adult Education is a critical aspect for the Italian education system, since the participation of adult population in life-long learning is still below under the European average (Cedefop, Isfol, 2012). In 2013 the participation rate in LLL activities stays at 6.2% out of the population 25-64 yrs. with no improvement since 2010 and with a significant divide if compared to Eu28 average 10.5% (ET 2020 benchmarks, in Eu E&T, 2014). Adult Education courses are provided mainly by Centers for Adult Education (CPIA), recently renewed²⁸ based in lower and upper secondary state schools. They lead to a first cycle education enabling students to gain the certification to complete compulsory education and to obtain an upper secondary school certificate. They also provide functional literacy courses for migrants. Nevertheless, students can attend courses organized by private agencies and no-profit organizations which are self-funded.

²⁸ By the Decree of the President of Republic n. 263 dated 29/10/2012 and published in 2013, 15th of February. The new Center for the Adult Education instituted at a national level are operative since s.a. 2014/15, according to regional plans.

Over the last few years, the increased cooperation between State, Regions and Provinces, has made the education system more flexible enabling students to switch to different pathways and from the education to the vocational training system to prevent school drop-out.

Concerning adult education provided in total by the State, available data refers to 2011/12 when a monitoring report has been published: the national offer consisted of 19.976 courses; the offer augmented by 6,8% since 2009/10 (Indire, Miur, 2012; Cedefop, Isfol, 2012). More than a quarter (34.7%) are compulsory education courses (1[^] or 2[^] level of education), 24.7% are Italian Language and Social Integration courses for migrants (CILS), and more than a half (54.3%) short modular courses on functional competencies, literacy and numeracy.

According to last Isfol²⁹ Report referring to 2012/13, 6.5% of the adult population (25-64) has attended in 2012 adult education courses, compared to 8.6% in OECD countries. *Adult education in Italy seems to be a neglected topic*, as the shortage of updated data and the lack of structured and targeted policies demonstrates. In addition, also this field reproduces inequalities between gender, generations and social classes. Italy, in fact, shows a *great divide among population in attending adult education according to the level of education*. Adult having achieved high level of education follow the EU average (16.1%), while the rate is lower if we consider the lowest level of education (1.6% compared to 3.9% in EU countries) (Isfol, 2013). Nevertheless, 2012/13 has seen a step forward in the participation to adult education pathways, passing from 6.3% of 2011/12 to 7.6%. This increase is more evident in areas that already reported the more elevated values: North-Western and Central Italy. These areas have been in fact targeted by several measures supporting the adult education tracks (Isfol, 2013, p.10).

It is finally interesting to highlight the *gender gap*: adult women are usually the more interested in continuous education and training (7% of women compared to 6.1% of men). This data witnesses the shortcoming of policies in strengthening the abilities of employed population and in enhancing the entry of unemployed population in the labor market. In fact, on one hand, the male labour force, widely employed compared to the female one, shows a scarce willingness in following education tracks, while, on the other hand, the female labor force, suffering from significant rated of unemployment and instability, struggles to enter in the labor market and remains at its margins, regardless a greater inclination to continuous education. Compared to other European countries, Italy reports a lower propensity in investing in education for adults: Isfol (2013,p.14) counts 15 millions of adult, mostly employed, who struggle to enter into education pathways for different reasons and they do not adapt to follow traditional educational models, based on non-empirical learning. By consequence, the labour market results incapable to absorb

²⁹ Institute for the Development of the Professional Education of Workers. It is a national research agency acting under the supervision of the Ministry of Work and Social Policies.

new competencies (as green economy, high-tehcnoogy...), necessary for being competitive at international level (Isfol, 2013, p.14).

d) Greece

**ECSE Research project: “Educational Challenges in Southern Europe.
Equity and Efficiency in a Time of Crisis” (2013-2015)
University Institute of Lisbon**

Vasiliki Kantzara, Ph.D

Associate Professor Dept. of Sociology

Panteion University of Social and Political Sciences

vkantz@panteion.gr

Contents

LIST OF TABLES AND FIGURES.....	27
INTRODUCTION	156
A. BACKGROUND INFORMATION	159
A1. GREECE: CONTEXT	159
I. Population qualification, employment, and education.....	160
II. Political cycles and educational policy: an overview of major trends in educational measures	168
III. Main educational policy after the onset of the crisis	172
Annexes.....	176
A2. THE EDUCATION SYSTEM: A PROFILE	181
Annexes.....	191
A3. PROCESSES AND MECHANISMS OF MONITORING AND EVALUATING THE EDUCATION SYSTEM	194
B. CRISIS AND ITS EFFECTS ON EDUCATION.....	198
B1. EQUITY: POLICIES AND ACHIEVEMENTS	198
Percentage of students with schooling social support-Expenditure per student (as % of public expenditure).....	198
Expenditure per student (GDP)	199
Pre-schooling enrolment.....	199
Participation of children with disabilities	200
Participation of students with ethnic minority background, immigrants & descendants of immigrants.....	200
Early school leaving (drop out)	201
Selectivity on tracking and transitions processes.....	201
Retention Rates.....	201

Specific national/political programmes for improving school performance.....	202
Population with the upper secondary attainment	203
Population with the tertiary attainment (ISCE 5 A or B).....	204
Percentage of population aged 25-64 below secondary attainment	204
Percentage of adults within vocational and educational system	204
PISA results (2000 - 2012)	205
ANNEXES	208
B2. FINAL NOTES ON EQUITY, EFFICIENCY AND QUALITY: ORIENTATIONS AND PROCESSES	213

List of tables and figures

Tables

A1. Greece: Context

- Table A1.1 Female and male employment rate by age and education level (2000-2013)
- Table A1.2 Female and male unemployment rate by age and education level (2000-2013)
- Table A1.3 Economic Indicators
- Table A1.4 Gini Coefficient, in EU27 and Greece (2000-2012)
- Table A1.5 At risk of poverty rate, in EU27 and Greece (2000-2012)

B1. Equity: Policies and achievements

- Table B1.1 - Pre-School Enrolment - Pre-primary education (level 0), % in relation to the same age total population and in relation to the same age total population

Figures

A1. Greece: Context

- Figure A1.1 Employment rate by educational level , in Greece (2000-2013)
- Figure A1.2 Evolution of educational attainment (%), by ISCED and sex, between 2000 and 2013, in Greece
- Figure A1.3 Evolution of educational attainment (%), by ISCED and age groups, between 2000 and 2013, in Greece
- Figure A1.4 Employment rate, in Greece (2000-2013)
- Figure A1.5 Employment rate of total population by sex and age range, in Greece (2000-2013)
- Figure A1.6 Unemployment rate of total population by age range, in Greece
- Figure A1.7 Unemployment rate of total population by age range, in Greece
- Figure A1.8 Inability to make ends meet in EU27 and Greece (2004-2012)
- Figure A1.9 Youth At risk of poverty rate (age less than 16 years), in EU27 and Greece (2004-2012)
- Figure A1.10 Public expenditure on education as % of GDP

A2. The education system

Figure A2.1 Number of teachers (ISCED 0-4) and academic staff (ISCED 5-6) by educational levels, in Greece (2004-2007)

Figure A2.2 Number of students, in Greece (2000-2011)

Figure A2.3 Number of students, by age groups, in Greece (2000-2010)

Figure A2.4 Participation/enrolment (15-24 years) by sex, in Greece (2000-2010)

Figure A2.5 Participation/enrolment by age groups, in Greece (2000-2010)

Figure A2.6 Participation/enrolment by sex and age groups, in Greece (2000-2010)

B1. Equity: Policies and achievements

Figure B1.1 Percentage of total population aged between 15 and 74 with Upper Secondary and Post-Secondary attainment, in Greece (2002-2012)

Figure B1.2 - Financial aid to pupils as % of total public expenditure on education, by ISCED level, in Greece and EU-27 (2000-2010)

Figure B1.3 - Early School Leaving by sex, in Greece

Figure B1.4 - Early School Leaving by labour status, in Greece

Figure B1.5 - Participation/ Enrolment of students at ISCED level 3-GEN - as % of all students at ISCED level 3, in Greece

Figure B1.6 - Percentage of total population aged between 15 and 74 with tertiary attainment - Greece, in Greece

Figure B1.7 - Percentage of population aged 25-64 below secondary attainment, in Greece

Figure B1.7 - Percentage of population aged 25-64 below secondary attainment, in Greece

Figure B1.8 - Participation rate in education and training (last 4 weeks), by sex, in Greece

Figure B1.9 - Participation rate in education and training (last 4 weeks) by sex and age (until 54), in Greece

Figure B1.10 - Participation rate in education and training (last 4 weeks) by sex and age (55 or older), in Greece

Introduction

The text at hand constitutes a report on the ramifications of the ongoing crisis on education. This national report is part of the project initiated and set up by colleagues of the University Institute of Lisbon that explores the impact of the crisis on education examined in terms of equity in the Southern European countries.

The report is an overview of developments and trends on a number of indicators. For this purpose a wide range of available statistical data is examined covering the period before and after the onset of the crisis, that is, 2000 to 2013.

Greece is a country situated in the south of the European continent, occupying 132.000 square miles; in 2001 the population amounted over the eleven million that decreased during the following decade. According to the last census of 2011, the population amounts to 10.816.286 people; women are 5.513.063 million and outnumber men (ELSTAT- Hellenic Statistical Authority 2014: 3, CEDEFOP 2009, 2014:7). Nationals coming from other European Union countries amount to almost 200.000, while nationals from outside European Union are a little more the 700.000. Greece is characterised by an ageing population (as other European countries), and migration flows in and out of the country that have an impact, according to CEDEFOP report, on the composition of the working force today and in the future (CEDEFOP 2014: 7; for a country profile see also Kantzara 2006a).

As a state, Greece is formed recently, in relation to other European countries, as it won the war of independence against the Ottoman Empire at the beginning of the 19th century. The establishment of a sovereign state was accomplished in 1830s and the institutionalisation of the education system followed soon after, in 1834 (see Kantzara 2001: ch. 3).

Currently, Greece is a parliamentary democracy that is ruled by a government and a President of Democracy; the latter has very limited powers. The peoples of Greece are represented by a 300-seats parliament, and the Members of Parliament are elected customarily every four years.

The financial crisis reached Greece in 2009 following the event of the private bank Lehman Brothers' bankruptcy, in the United States of America, in 2008. In 2009 Greece entered a phase of economic recession, characterised by massive unemployment rate (27,5% in 2013 according to Eurostat) and rising poverty for millions of people (more than 23% in 2013) (for detailed statistical data see below section A.1). Rising existential

insecurity, the continuous economic instability, and a feeling of powerlessness, people have, characterise social life since 2009 to the present.

The onset of the crisis did not leave political life untouched. Following the national elections of 2009 the centrum, social democratic party (PaSok) won and took over from the right-wing party of New Democracy (ND); PaSok did not last long and gave over to a government composed by technocrats, which is known as Government Papadimou (2011-2012). Next, following the national elections of 2012, a three party coalition government was formed; it consisted of political parties having a centrum-left, centrum, and a right-wing ideology. This coalition governed the country until the national elections at the beginning of 2015 (January the 25th).

Since 2009, the Greek governments dealt with the crisis and its effects by adopting 'austerity' measures, while at the same time have attempted to reform radically both public and private institutions. The measures and reforms were to a large degree imposed by the international organisations involved in the 'bail out' of Greece, the so-called 'troika'; the troika consists of representatives from the International Monetary Funds (IMF), the European Central Bank (ECB) and the European Commission (EC).

Greece received billions of euros from the troika as 'bail out' after signing two agreements (Memorandum of Understanding). The bailing out of Greece, however, does not constitute help in the strict sense of the word, for it is a loan, which gives the country the time to 'restore' 'healthy' economic development and combat corruption in public institutions and in the political sphere; another issue, but related is that most of the loan money coming into the country is been used to paying back previous loans and thus it goes immediately out of the country. In this way, the debt is being actually renewed. In the meantime the continuation of the economic recession for five years in a row denotes that the national debt has increased, instead of decreased (see Public Debt Management Agency - www.pdma.gr).

The institution of education, as other institutions, has not been left untouched by the crisis and its effects in Greece, both in direct and indirect ways. Austerity measures meant severe cuts in public spending on education as well, while the rising level of unemployment, the reduction in salaries and the raising of taxation have had severe effects on people's lives. This in turn has affected children, for it is reported that many of them lack sufficient nutrition, clothing, and materials for school, to name only a few of the ramifications of the crisis. It is worth noting here that civil society has reacted

immediately and has set up networks that provide help and relief both to children and adults (see Kantzara 2014, Tziantzi 2015).

Research and study on the ramifications of the crisis on education is to my knowledge at the moment of writing rudimentary; some reports that have been published are based on statistical data, and to which I shall refer to in the course of this report.

In this text I attempt to track trends from the available statistical data from European Union (namely Eurostat), Eurydice, OECD, Greek statistical agencies and research institutions as well as other international organisations. On the basis of indicators that cover not only purely education aspects but refer to context such as unemployment, poverty rates and other parameters, I attempt to examine the effects of the crisis and possibly discuss some implications in terms of equity and efficiency, though this is at the moment difficult to ascertain, due to lack of relevant data and scientific publications.

A few words about the concepts used: the concept of equity in relation to education usually denotes the principle of *equal opportunities in accessing education and successful study completion*. The concept of *efficiency* is complex; by this concept the initiators of this project, at the University Institute of Lisbon, mean the effort and the accomplishments of education in terms of equity. Though the term efficiency has customary a different meaning, the initiators of this research project wished to relate it to equity, that is as desired outcome of the education system performance.

A word in advance: lack of statistical information on issues, such as work load on education personnel or stress experienced by pupils as well as the organisation of help and relief makes it difficult to ascertain whether the education system ‘lost’ its capacity to guarantee equity and efficiency, because of the crisis. This point will be dealt in the last section of this report.

The statistical data, as mentioned above, covers the period from the year 2000 to 2013, in order to have a more complete overview of the changes that took place, attempting to uncover possible trends related to the subject under investigation.

The report is structured in *two sections*. The first section (section A) is divided into three sub-sections: the first sub-section provides statistical information on the context and the second focuses on the performance of the education system. The third sub-section discusses monitoring and evaluating the education system.

The second section (section B) focuses on the effects of the crisis on education and it is divided into two sub-sections: the first focuses on equity issues in Greek

education and the second on quality of education that discusses processes and orientations of the system. The appendix at the end of the report comprises statistical tables and figures arranged per section and indicator discussed that derive predominantly from the Eurostat data base.

A. Background information

In this section, the data discussed refers to the socio-economic and political national context that influences the educational policy and the level of performance of the education system in Greece. The indicators that are presented refer to are among other, qualification of the population, unemployment rate, income inequalities, public and private funding of education. The data derives from official statistic agencies (e.g. Eurostat, Eurydice and Hellenic statistical agencies). The tables are to be found in the Appendix.

Furthermore, this section consists of three sub-sections, starting from the national context and moving to education system and ends with evaluation processes of the education system.

A1. Greece: Context

This sub-section consists of three parts, starting from *I) the qualification of the population and moving to II) political context and educational policy and III) educational policy since the onset of the crisis.*

As an introduction, it is worth mentioning some data concerning the economy. The Greek economy has been ‘shrunked’ as it were: the General Domestic Product (GDP) has decreased from 237,431 to 182,438 billion euro (in 2009 and 2013 respectively); during the same years unemployment rate rose sharply from 9,6% (in 2009) to 27,5% (in 2013), while in the other EU 27 countries, the unemployment rate rose by 2,5% (from 9,5% in 2009 to 12,0% in 2013). In Greece, the public debt also increased from 301,002 (in 2009) to 319,133 (in 2013) billion euro and the prognosis is that the coming years it shall continue increasing.

In relation to other European Union countries, one can see from the table below that the phenomenon called crisis have hit Greece very hard in economic terms.

Table A1.1 Economic Indicators

GREEK ECONOMY					
1. Main Economic Indicators	2009	2010	2011	2012	2013
Nominal GDP (in mil.€)	237.431	226.210	207.752	194.204	182.438
Percentage change of real GDP	-4,4%	-5,4%	-8,9%	-6,6%	-3,9%
Harmonized CPI	1,3%	4,7%	3,1%	1,0%	-0,9%
Unemployment rate	9,6%	12,7%	17,9%	24,5%	27,5%
2. Public Finance & Debt	2009	2010	2011	2012	2013
General Government Debt (in mil.€)	301.002	330.291	355.954	304.691	319.133
General Government Debt (% of GDP)	126,8%	146,0%	171,3%	156,9%	174,9%
General Government Deficit (-)/ Surplus(+) (% of GDP)	-15,2%	-11,1%	-10,1%	-8,6%	-12,2%
EUROZONE					
	2009	2010	2011	2012	2013
Percentage change of real GDP	-4,5%	2,0%	1,6%	-0,7%	-0,5%
Harmonized CPI	0,3%	1,6%	2,7%	2,5%	1,3%
Unemployment rate	9,5%	10,1%	10,1%	11,3%	12,0%

Source: Public Debt Management Agency, n.d. (accessed on 15-2-15).

Next I present and discuss indicators that refer to qualification and employment issues in Greece.

Population qualification, employment, and education

Qualification of the population

In general terms, the educational qualification of the population aged 25-64 has increased from 2000 to 2013. According to Eurostat data, the majority of the Greek population in 2013 (39%) has attained educational qualifications at secondary education level.

In 2013, in the population, aged 25-64, according to the Eurostat data the qualifications are disseminated as follow:

- ✓ 33,1% of the population was qualified at compulsory education level (ISCED 0-2);
- ✓ 39% in upper secondary education and vocational-technical education (ISCED 3-4);
- ✓ 27% had reached tertiary education (including master's and doctoral thesis (ISCED 5-6).

The trend is increasing in attaining educational qualifications in the general population; women particularly caught up with men at all levels: for example, in level 0-2, women's attainment declined from 50,3% in 2000 to 31,5% (in 2013), while men's respective attainment declined from 46,4% to 34% during the same period. Most impressive is the increase in tertiary education qualification: women's attainment

increased from 15,5% (in 2000) to 27,1% (in 2013). The average of qualification attainment in tertiary education is considered positive and in the direction of the target posed by OECD.

However, while the trend could be judged on the whole as positive, a closer look reveals that the pace varies in different years. During the years 2003-04 and 2010-11 at educational level 5-6 (higher education), there is an increase of 2%; in more recent years, especially between 2012 and 2013, the increase in qualifications is less than 1%.

In 2004 the Olympic Games took place in Greece and one would expect a general optimism, while in 2010 and 2011 after the start of the crisis and the first serious signs of enduring economic recession, a number of young people who became unemployed very possibly returned to education to complete their studies, in order to find employment or continue postgraduate studies, and/or graduate before they migrate abroad. To my knowledge there is no particular study addressing the above mentioned developments; my interpretation here is based on discussions with (older) students, and comments and reports made by colleagues from other Universities in Greece and abroad. Ethnographic research indicates that students are more focused on their studies and want to complete it on time (Thanos, 2014).

In 2012, at educational level 5-6, women aged 25-34 outnumbered men by almost 10% (39,8% and 39,0% respectively) and this analogy is almost reversed in the age category of 55-64, in which men outnumber women by 8,3%. It is worth adding that people of this age category were students during the late seventies and eighties, when the total of students was under the 100.00, while today it is more than 330.000 denoting a massive development in tertiary education (information on previous periods, see Psacharopoulos 2004).

Noteworthy: in 2012, the majority (44,9%) of those aged 25-34 have attained a secondary education level (level 3-4), 34,2% of them has studied at tertiary education (level 5-6) and 20,9% of them completed the compulsory education (level 0-2). The increase of those attaining a tertiary degree qualification between 2000 and 2012 is 11,4%, which increase is the highest of all educational levels (see tables in A.1, indicator 1, in Appendix).

About the Greek education system, one could argue that it is characterised throughout its history by an increasing social demand for more education and therefore an increase in acquiring educational qualifications. In the 20th century, this increase was often attributed to a 'zeal for learning', when consideration of status sustenance,

employment opportunities and/or social mobility played a decisive role in people's choices; increased social demand have put a stress on the state to respond and educational policy tried in various ways to respond to demands for more or wider access to education (see also the historical study of Tsoukalas 1992). After the dictatorship (1967-74) the demand for more education has led to an expansion of tertiary education at an unprecedented level, including studies at post-graduate level (see also Prokou 2013).

- **Employment rate**

In relation to employment rate, a clear cut impact of the crisis and the economic recession is the diminishing of this rate from 2000 to 2013.

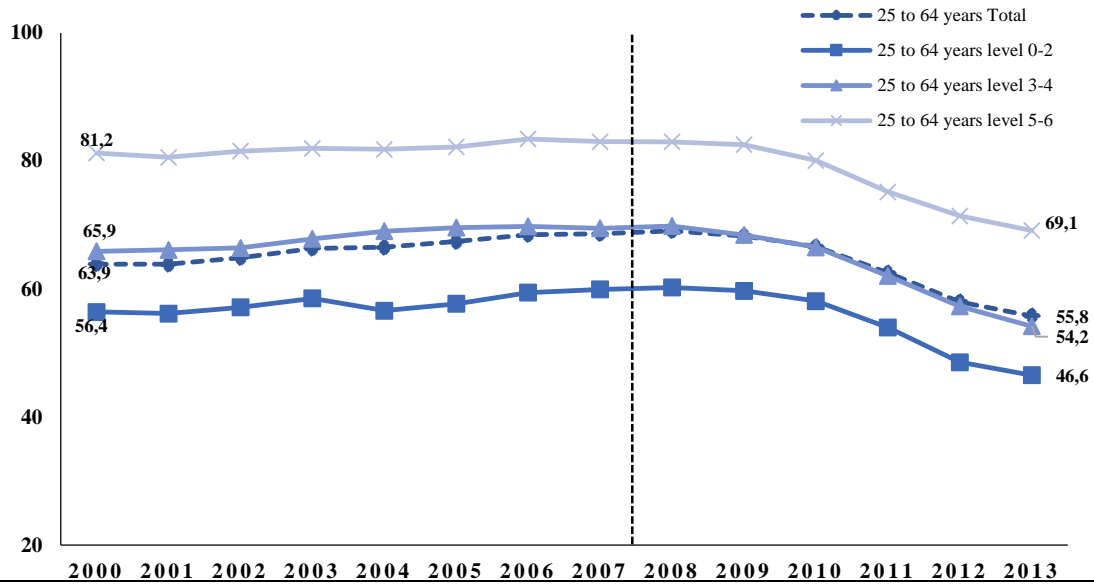
The data by age category shows the declining of employment rate at younger ages (36% those aged 15-29). More particularly, the employment rate of 15-24 years old declined by almost 16% (from 27,6% in 2000 to 11,9% in 2013); the employment rate of 25-29 years old declined by almost 20% (from 68,1% to 48,5%); while for those aged 40-64 during the same period the employment rate declined by almost 5% (from 58,1% to 53,7%).

In relation to gender: aged 25-64 men's employment declined significantly by 23% (from 71,5% in 2000 to 58,4% in 2013); while women's employment declined by less than 1%.

In addition, the employment rate of men, those aged 40-64 declined by 12% (from 77,5% to 65,4%); while women's at the same age category was increased by more than 3% (from 39,8% to 42,2%) (see A.1 Indicator 2 ER, Appendix).

Taking educational level into account:

Figure A1.1 Employment rate by educational level , in Greece (2000-2013)



Source: Public Debt Management Agency, n.d. (accessed on 15-2-15).

Employment rate in all age categories of all educational levels has declined between the years 2000 and 2013.

At the first two levels 0-2 (primary & lower secondary education), the same trend could be seen in European Union (27 countries): ages between 25-64 years old left employment by 2% while in Greece this was almost 10% (from 56,4% in 2000 to 46,6% in 2013).

The pace of the trend increases in the year intervals of 2010-2012; one could see that the onset of the crisis was visible in employment already in 2009.

At the educational level (0-2): pre-primary, primary and lower secondary education. The employment of all age categories examined has declined; this holds mostly for men whose employment rate declined by 20% (from 78,6% to 58,3%); while women's only 3% (from 36,6 to 33,5). Especially in the age category 25-29, men left employment by almost 30% (from 83,9% to 52,2%) and women by 6% (from 36,8% to 30,3%). The second age category of 30-34 years old: men's employment rate decreased by almost 22% and women's by 6%. On the whole the employment gap between men and women has narrowed.

At the next educational level (3-4): upper secondary and post-secondary non-tertiary education. The same trend as in the previous educational level is witnessed here too: the age categories of 25 to 29 and 30-34 men left employment by almost 20% (68,2%-

46,4% and 90,0%-70,2% respectively); young women of the same age category considerably decreased their employment rate by 15% (from 54,6% to 39,1%), and by 4% at the age above 30 years old (from 52,8% to 48,0).

At the educational levels (5-6): first and second stage of tertiary education (bachelor and postgraduate studies). The same declining trend continues when exploring higher education. More specifically the employment rate declined by 12% (from 81,2% to 69,1%,). The same trend about men's employment in relation to women is been ascertained here as well. Men's employment rate aged 25-29 and 30-34 declined by 20% and almost 14% respectively; women's employment rate aged 25-29 and 30-34 declined by 19% and 14% respectively.

Conclusion: young men 25-29 and 30-34 years old at educational level 0-2 left employment at a rate that outnumbers all other age categories and educational levels (see A.1 indicator 2 ER by ISCED level in Appendix).

- **Unemployment rate**

The overall unemployment rate has increased by 16% (from 11,6% in 2000 to 27,5% in 2013). From the age categories the most affected are the young people: more specifically, the unemployment rate of those aged 15-24 increased by 20%, those aged 25-29 by 26%, aged 30-34 by 19%, aged 35-39 by 17%; while of those aged 40-64 the unemployment rate increased by 15%. It seems that 'the older the better'. In relation to gender the age category most affected is young and male: aged 15-24 unemployment rate increased by 32% (from 21,6% to 53,6%; young women's increased by 26%); aged 25-29 rate increased by 28% (from 12,2% to 40,8%; while women's increased by 22%).

Taking into consideration age and educational level the most affected by unemployment are those from level 0-2 and at the age population of 15-64 years old, whose unemployment rate increased by 21% (from 9,8% to 30,1%) (see Indicator 2 UR, in Appendix).

In relation to the EU 27 countries:

At educational level 0-2: in Greece the unemployment rate rose by 20,4% (from 8,2% to 28,6%), and in EU 27 by 8% at the age category 25-64. At the following educational level 3-4: in EU 27 countries there is a slight increase of unemployment rate (from 8,2% to 8,6%), while in Greece it is up to 17% (from 11,0% to 28,0%) (Greek population more educated at this level by 3% more than the population in other European countries).

Young people between 25-29 years old were hit the hardest, women by 25% and men by 27% increase of unemployment rate (from 24,3 in 2000 to 49% in 2013-and by men from 12% to 39%). By comparison, in the 27 European countries the average increase of unemployment rate was by women about 1% and by men at 2.5%.

In the next age category 30-34 years old, the respective increase in unemployment rate for both men and women amounted to about 20%. The following educational level (5-6): in EU 27 countries there is a slight increase (1,4%) of the unemployment rate, while in Greece it increased by almost 12% (from 7,4% in 2000 to 19,3% in 2013).

Both men's and women's unemployment rate in this age category increased by 12%: men's from 4,9% to 16,1%; while women have a higher unemployment rate that was further increased from 10,7% to 22,7% (see Indicator 2 UR, in Appendix).

At the age of 25-29, men's unemployment rate increased the most of all age categories by 24% (from 16,2% to 40,6%); while women's at the same age group by 22% (from 22,5% to 44,6%). The unemployment rate increases in the age category of 30-34 years old for both men and women by about 15%.

In sum: the lower the educational level the higher the increase of the unemployment rate: level 0-2 rate increased by 20,4%; at level 3-4 the rate increased by 17%; at educational level 5-6 the rate increased by 12% (see Indicator 2 UR in Appendix).

The young people were hit the hardest by unemployment, especially those aged 25-29 saw a 26% increase of their unemployment rate. In relation to gender the age category most affected is young and male: men's aged 15-24 rate increased by 32%; young women's rate increased by 26%; second in increase is those aged 25-29 whose rate increased by 28%; while young women's rate increased by 22%.

It seems that the older and more educated the less increased is the unemployment rate; it looks as though older people, i.e. those above 34 years old and highly educated are better off and perhaps have a safer position at the labour market. Whether this assertion is valid, depends on the developments of the labour market during the crisis and the branches of the economy that went into deeper recession than other. These developments need further investigation, which exceeds the purposes of the present report.

Gini coefficient of equivalised disposable income

Measuring income inequality by the Gini coefficient, the statistical data show that in Greece it has risen from 33% in 2000 to 34,3% in 2012; in the European Union (27) countries in 2012 the coefficient was at 30,5% (see A.1 Indicator 3 in Appendix).

At risk poverty rate

The poverty rate has risen by 3% (from 20 to 23,1%); while in European Union rose by less than 1%. Greek women suffer slightly more than men, though the unemployment rate in some cases affected more men than women (men: from 19% to 22,5% and women 20% to 23,6%). The European rate in 27 countries for women rose by 0,8% (17%-17,8%) and increased for men's by 1,1% (see A.1 Indicator 4, in Appendix).

- Inability 'to make ends meet'

According to statistics from Eurostat there is, a dramatic increase to my view of the people who are unable to meet their daily needs: the increase is 20,8% (from 14,2% in 2004 to 35,0% in 2012). The percentage in numbers means millions of people, more than 1/3 of the whole Greek population. In the European Union 27 countries the respective percentage rose by 1% (see in Appendix, indicator 4a).

Child poverty rate age under 16 & 18 years old

The child poverty rate has risen by 7,5% (from 19% in 2000 to 26,5% in 2012) in Greece, for children under 16 years old; while the European Union countries saw an increase too, though not so acute, less than 2% (from 19,6% in 2005 – 21% in 2011) (see A.1 Indicator 5, in Appendix).

The aforementioned findings are supported by two UNICEF reports in Greece in 2012 and 2014. The findings refer to children under 18 years old. In one year the poverty rate increased by 3,3% (from 23,6 in 2011 to 26,9% in 2012) (UNICEF 2014: 26). Children's 'risk of poverty and/or social exclusion' has also increased by 9% (from 26,5% in 2005 to 35,4% in 2012) (UNICEF 2014: 32). The UNICEF reports are based on Eurostat statistical data and are published in the Greek language.

Conclusion: children under 18 years old have been affected by poverty as much as adults have done.

Funding of Education

Funding of education has decreased too, though statistical data is hard to find. Data from the Eurostat stop in the year 2005, that is four years before the onset of the crisis.

Funding of education in Greece is an issue of public and private concern and very often a matter of dispute. Since the 1960s, progressive educational movement asked for more funding in education, which has been neglected ever since. The target of spending 5% of the GDP was never reached. These progressive educational movements were usually comprised by students, teachers and other interested parties, whose political ideology was between centrum and left wing. After the dictatorship, the target of spending 5% was clearly voiced by left wing political parties. It exceeds the purpose of this report to view in detail disputes on funding of education during the last century.

According to the available statistical data, funding was not reduced from 2004 onwards but increased by more than 1% (from 3,83% to 4% in 2010).

Other sources, such as those coming from the political party of Syriza (being the major opposition after the national elections of 2012), calculated the budget cuts as follow: in 2009 public expenditure on education was 3,13% of GDP, while in 2013 dropped to 2,78% (estimated in billion euro: in 2009 it was more than 7 billion while in 2012 dropped to 5 billions). The General Domestic Product at the same period dropped: in 2009 it was approximately 231 billion and in 2013 approximately 183 billion euro (EEKE 2012: 5).

These finding are supported by Eurydice reports (2014) where the budget spent on education was in 2013 a little less than 6 billion euro. Also in a relevant Eurydice publication (2013), it is argued that in 2011 and 2012 that Greece was among the countries that cut of their budget on education by more than 5% (Eurydice 2013: 11).

At the same time, the well-known PSI (Private Sector Involvement – in deals over sovereign debt restructuring - most famous as ‘haircut’) was carried out in 2012 and left higher education (especially universities) without any deposits in currency; this is because they were asked to transfer their deposits (an estimate talks about 44 million euro) to the Bank of Greece (that carried out the PSI) by the Ministry of Education. The PSI was meant for the private sector, not the public one, and this raises serious questions of legal nature.

Every year, since 2011 budgetary cuts take place in Universities that today amount to 30% and in some cases 50% of the budget they had before 2009 (information from colleagues in other universities, media coverages and communication of the Dean

to personnel at Panteion University, where I teach, in 2012, 2013, and 2014). At the internet site of Panteion University, for example, information on the budget is displayed as follow: in 2012 budget 4.100.000 million; in 2011 budget 4.633.838 million; and in 2010, budget 6.685.329 million euro (<http://www.panteion.gr/index.php?p=content§ion=17&id=148&lang=el> [in Greek] accessed on 15-2-15).

In relation to the private expenditure on education, data is only available until the year 2005. According to the Eurostat then, private expenditure on education has risen between the years 2000-2005 (from 0,24% to 0,26%). Taking into consideration however ‘private expenditure of households on education’, the data shows that the percentage in Greece has risen by 0,5% (from 1,9% in 2000 to 2,4% in 2011); while the European Union 27 countries average remains around 1,0%. Though Greece has not issued any tuition fees at all levels of education, it seems that on average Greeks spend more on education than other European countries citizens. The report published by KANEP/GSEE in 2011, shows that the percentage of EU 27 countries on education as part of consumption in 2008 was 1,05%; Greece was first on the list with 3,23%, followed by Cyprus (2,96%) and Letland (2,36%) (KANEP/GSEE 2012: 75).

Conclusion: Statistical data that accurately depicts public funding on education in Greece is hard to find. Thus, some analysts talk about a dramatic decrease in public spending on education. At the same time the more the government cuts on educational budget it seems the more the relevant expenditure has to be counterbalanced by households; the latter seem to invest more in order to reduce the negative effects of the crisis on the schooling of their children. It is a view shared by many of my colleagues (private communication).

Political cycles and educational policy: an overview of major trends in educational measures

During the period under discussion, 2000-13, the two political parties alternating on power, as it is almost the custom since the 1980s, are the conservative party of New Democracy (ND), a right wing party, and the Panhellenic Socialist Movement (PaSoK), a centrum, social- democratic party.

The last national elections of 2012 gave rise to a three-party coalition in government, as it is also mentioned in the introduction. The coalition government was composed by the aforementioned two parties and a splint of a left-wing party (Democratic

left –DIMAR) that could be better characterised as centrum-left. The coalition lasted a year, as DIMAR disagreed with the policy followed and withdrew from the government (in 2013). The two parties were on power till the following national elections, planned for the 25th of January, 2015.

The changes introduced in education in Greece after the onset of the crisis in 2009 were usually supported by both political parties, with minor differences only in the rhetoric used to persuade the general public. Both political parties attempted to implement parts of the Bologna process (1999) in Greece (KANEP/GSEE 2013, Prokou 2010). The culmination of the political alliance is the voting in parliament of the law number 4009 in 2011, referring mostly to tertiary education, which has received an absolute majority of the votes (180 votes out of 300 MPs). This is new in Greek educational policy. Historically, every government passed laws that the next government that came to power usually abolished and this kind of practice was characteristic from the establishment of Greek education in the 1830s and it continued in the major part of the 20th century (see Kantzara 2001: ch. 3; for a more recent analysis Gouvias 2008, Prokou 2008a, 2008b).

In relation to recent education changes, one could argue that policy measures attempt to bring the Greek education system closer to the European standards. This has been the case for instance in 1996 and 1997, which are the years that education laws introduced institutions such as: multicultural education schools, education for pupils with disabilities, and adult education (at compulsory level of schooling). Additionally, recruiting teachers has drastically changed (more on teachers below). Adult education has been introduced in terms and in the context of life-long learning in 2010, though the concept exists since the educational law of 1982.

Beginning 2000 and up to 2007, educational policy attempts to tackle some of the long standing problems in education, such as: drop-out (at compulsory education level), ‘low’ level quality of technical-vocational education (at secondary education level); and ‘difficult’ entrance exams to tertiary education; aspects of the Bologna process are being introduced in tertiary education; and teachers’ recruitment and training has been subject to alterations as well.

In relation to drop-out: several steps were taken in pre-primary education and in level 0-2 to make schooling more appealing: so for example textbooks changed and in 2001 a new method of teaching was introduced, called diathematikotita (inter-subject or cross subject teaching); it denotes teaching a subject from different angles and/or subjects: for example, teach about a city both from a historical and geographical perspective. There

were other measures as well, and it seems that the drop-out rate (about 10% I 2013) is low in EU 27 countries (see relevant indicator in the next section B.1, indicator 6- Early school leaving).

At secondary education level, measures were taken for compensatory education. In Greek it is called enischtyiki didaskalia (supplementary or remedial teaching) and it has been introduced in schools. Teachers of the same school usually teach at this provision. The idea behind this measure is to counterbalance the importance of seeking help privately, which is costly and not accessible to low income families. To my knowledge there is no definite evaluation report on the effects of the aforementioned measure.

Technical-vocational training has been a major concern to education policy, for it is generally considered as having a low level of quality. Except from the courses taught attempts have been taken to improve the status of technical-vocational education: for example it is permitted that its students take part in the entrance exams to the university. Another attempt was to issue a 'free-grade' technical-vocational training (acronymed as IEK- and meaning Institute of Professional Training). 'Free grade' means that graduates from different levels of education would apply for enrolment, which they actually do. In this way, students come from varied educational backgrounds and levels of achievements and not only from low secondary education, who are considered as 'less able' students.

In relation to entrance exams to tertiary education: access to tertiary education is being regulated by exams, called 'Panhellenic exams', obligatory for every pupil, who wishes to study at a university or higher technological institute. The exams are considered to be competitive, and pupils spend at least two years, if not more, preparing while families spend a lot of money either to a 'phrontistirio' (private preparatory school) or in hiring private help in order to secure the success of their offsprings. The Panhellenic exams, no matter how difficult or hated they may be, are nonetheless publicly accepted, for they are considered to be a meritocratic way to enter tertiary education. Exams constitute a way of securing equality in opportunity and meritocracy at the same time. However, not all kids coming from all social strata have the same chances of access to tertiary education, for as sociological studies show, success depends on economic and cultural capital of the family (see among others, Sianou- Kyrgiou 2010a).

Tertiary education and Bologna process: two education laws (3374/2005 and

3549/2007) introduced among other changes, ‘a system of transference and accumulation of credits’ (Prokou 2010: 66; KANEP/GSEE 2013); measures for quality assurance and evaluation of universities were introduced, making thus Universities accountable for their performance. In this effort, as we shall see below (in sub-section III) the modern vocabulary of the University as an enterprise was being employed, such as accountability, excellence, and needs of the labour market; the main instrument has been evaluation of educational institutions performance and budgetary cuts in order to enforce the authorities of the universities to conform to the central government (see Prokou 2010, 2013, 2014c).

In relation to teachers: Teachers in every level of education are not very well remunerated in relation to other European countries, but their work is exaggerated in ‘immaterial’ importance (see also Kantzara 2001). To qualify as a teacher one has to study at university level, even teachers in primary education (since 1982). Pedagogical competence is a matter of concern to education authorities and therefore in-service training has been available to newly appointed teachers until recently.

Teachers’ appointment in secondary education is accomplished after taking exams in the respective fields. The ministry decides the number of positions available and the exams are carried out by a special institution acronymed ASEP (Anotato Symvoulion Epilogis Prosopikou - Higher Council of Personnel Selection), which is responsible of carrying out the exams for the whole public sector. This kind of exams are often challenged for they prove the knowledge on a subject perhaps but do not prove if a prospective teacher is capable of transferring his/her knowledge to pupils.

The law of 2011 tries to give an answer to the above criticisms by making it obligatory for aspiring teachers that they can prove their pedagogic competence. Before 2011, it was the responsibility of the Ministry of Education to provide in-service training in order to equip teachers with the pedagogic competence in case they had not acquired one during their studies. Since 2011, it is the responsibility of the aspiring university graduate who wants to become a teacher to be qualified pedagogically; to do so, if s/he is not a graduate of pedagogic departments, s/he has to study further in an institution that provide such a competence (e.g. one of them is called ASPAITE).

Admittedly, the Greek education system has an academic orientation and it is addressed to the majority of the students and not to the minorities. There is a great emphasis on science and scientific knowledge and less on vocational or professional training. The system follows the tenets, especially at tertiary education of the ideas of

Humbolt (Prokou2014a).

The overall attempt of the government has been to enhance educational access while taking some measures to facilitate school success and minimise drop out.

In sum, one could argue that the years before the crisis are characterised by expansion at all levels of education, while concerns were expressed in issues, such as drop-out, adult education, education for students with disabilities; other concerns that are on the political agenda refer to the low status of technical-vocational training, migrant education, and in tertiary education, control of the institutions and the weak relation of learning with the labour market.

In relation to the last three concerns, it is worth mentioning that though people recognise the importance of a solid vocational-professional training it still remains socially underestimated (Prokou 2015, personal communication); migrant and minorities education is still a concern; in case of migrants' offsprings more than ten year ago there were cases that access to education (at compulsory level) was denied, for prospective pupils lacked certain certificates (e.g. a birth certificate); at the end, after citizens' mobilisation access to education was permitted. In addition, experiences from Greeks born outside the country and returning to Greece (repatriates) show that discrimination practices apply to them too. Cases like the aforementioned ones show that education is generally considered a public good, but access to which is relatively reserved and restricted to Greek nationals, who have no disabilities, and especially for those who are born in the country.

On the whole, the Greek education system with its free of tuition fee studies has a strong equalitarian orientation; in practice though those who are equipped with the necessary economic and cultural capital from home tend to have better educational results and unhindered school career.

Main educational policy after the onset of the crisis

After the onset of the crisis in 2009, educational policy is characterised by three main strategies: first extensive budgetary cuts; secondly, extensive educational reforms; and thirdly extensive lay-offs of administration and educational personnel.

The cuts in educational budgets refer to infrastructure facilities and a policy of not hiring new personnel, the famous 1 to 10 analogy; it means when 10 public servants leave employment in public sector (including education) only one new employee is hired. Public funding of educations has been reduced, but funds for the extra administration

seats at high level have been increased, especially at universities, a point I return to below.

After the onset of the crisis, the tempo of the laws passed for education is so swift that no one can keep up with the changes introduced. In 2010 and 2011 measures were taken for primary and lower secondary education; in 2011 it was also the turn of tertiary education and in 2013 for upper secondary education.

A main target of these reforms in the first place is the downsizing of education, of 'shrinking' it in a way. In primary and secondary education, schools have merged, and buildings have been shut down (about 1500, see next section A.2). The same procedure was followed for tertiary education as well. The idea behind is to make the education system 'more efficient' by dividing it into larger units, which ideally are less costly to control and to manage. This is more apparent at tertiary education where the merging of departments and universities have created larger units, and on top of this university departments have been forced to form faculties, which at the same time meant extra management structures. The final target has been the control of education system and this is to be seen by the implementation of evaluation in all levels of education.

The downsizing continued in 2012: the administration personnel followed, who was put in suspension and some have been already laid-off; educators at secondary education were also laid off or driven away from schools due to enormous cuts in their salaries (more than 22.000 teachers left education, see statistical information below, section A.2). Teaching hours at secondary education have been increased by 2 hours (from 21 to 23 teaching hours) a week. Salary cuts have been substantial; some argue that salaries have been reduced by 35%, and some argue that the reduction is even higher. In addition, the working-load has been also increased as many tasks from administrative personnel gradually become tasks undertaken by teachers and professors.

Extensive budgetary cuts and lack of perspective for the future has driven many prospective students away from public education institution and directed them to private institutions in the country or abroad. There is no official statistical information, and one can indirectly infer it by the fact that many migrate abroad for their studies. Migration out of Greece has been increased and affected students of all the other two levels of education. Massive unemployment meant that many highly educated individuals migrated to other countries seeking employment, and less precarious conditions of life. A kind of 'brain drain' is taking place and thousands (estimations vary and some even mention more than 200.000 young well educated Greeks), migrated and are employed outside of Greece (Smith 2015).

Regarding tertiary/higher education: the law number 4009/2011 mentioned before constitutes a form of policy that attempts to implement many aspects of the Bologna process (1999) and Lisbon strategy (2001) in education in Greece. Main changes refer to management structure, the introduction of evaluation at all levels and the attempt to bring university studying closer to the labour market. Terms such as innovation, excellence, and prosperity promised for all, if they help that Europe becomes competitive in the world economy, has entered Greece as well. The academic university is losing gradually from the market.

“I am a specialist in higher education policies so I am going to talk about the policies in this area. I would say that to a certain extent policies have been influenced by conservative political cycles in Greece being in power during the last years. I have done some research that show international influences are really strong and actually they have played a very decisive role in the most recent higher education policies, especially those referring to a framework law that it was passed in 2011 it is a well known law 4009 passed in 2011 and this law is very much influenced by the Bologna Process and especially the Lisbon Strategy. And these influences stemming from European education policy mainly are about Issues such as a) mobility, attractiveness and internationalisation of European universities, which is promoted also b) life-long learning is promoted and the policies of accreditation, through the introduction of the ECTS which is of course an old phenomenon but also there is somehow a network that the European Qualification Framework (EQF) concerns also higher education, also universities which is a policy originated from training policies, European policies on training; also another issue regarding these influences is the issue of c) quality assurance and accountability, which is very strongly supported and promoted; also d) new public management is promoted; there are efforts for an e) reduction of state funding, and funding is very much related to the results of the evaluation, regarding the latest higher education framework law; and also there are efforts for an effective f) linking of education and research with the labour market; and finally g) research, innovation, and excellence are issues that are promoted and they are very much associated with the previous issues (Prokou, expert interview, 2-12-2014).

A critique addressed to the aforementioned measures, especially at tertiary education is that it drives prospective students to private funded institutions or abroad. Thus, public education is been ‘dismantled’, while at the same time it is being indirectly privatised: for example, a few post-graduate study programmes started charging tuition

fees, while most were free of tuition fees before 2011. However the education law passed in 2011 deemed such practices legal and urged universities to ‘find their own funds’.

The managing characteristics of the educations have been subject to change, but the content, i.e. the studies, so far have not been changed, at least not directly. This has been touched upon by the law in 2013 that refers to upper secondary education (Lyceum – 3 years of study): this law tries to regulate entrance to tertiary education from the first class of Lyceum. Until 2013 university entrance exams are taken at the end of the third year of Lyceum. According to the new law, courses have been diminished and exams taken every year to pass the class also count (by 50%) for the university entrance. That meant issuing a data bank for the exam questions, which actually gave rise to students’ reactions in 2014, for they massively failed in these exams.

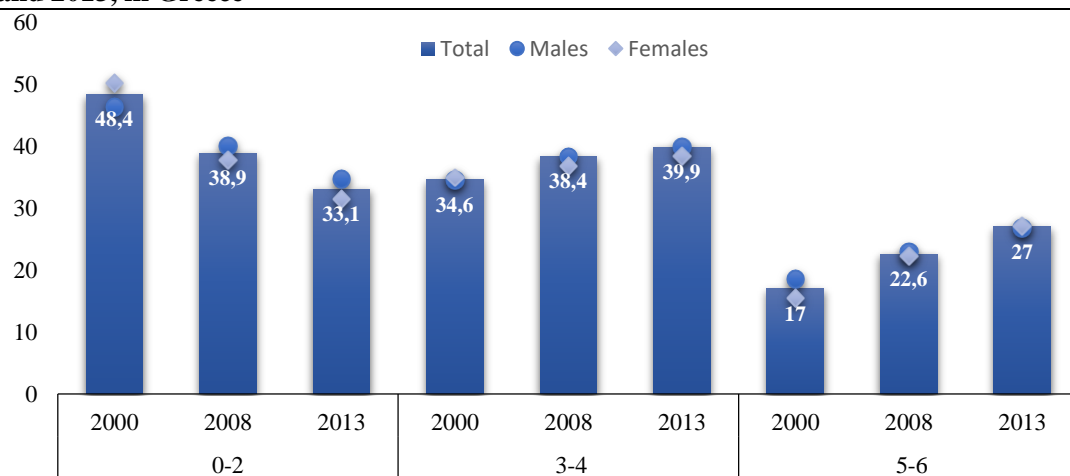
It is too early to evaluate the aforementioned measure; critique however shows that many more students will be now obliged to follow extra courses at the ‘phrontistirio’ (private institution providing lessons to students to help them with school exams). Those who cannot afford it shall be less well prepared for the University entrance (Panhellenic) exams.

In short: long standing problems in education are not dealt with in a forward manner. These problems are related to equality of opportunity for all kids in Greece. After the crisis, the situation for minorities, migrants, pupils coming from disadvantaged families, adults, and students with disabilities has worsened, though as we shall see in the next section statistical data is hard to find. At the same time educational reforms make access to higher education more difficult for those who are less privileged in cultural and economic terms. The quick pace of the changes that are introduced orient the education system to align more to market demands, while changing nothing to the better to some of the standing problems, such as quality of technical vocational training, facilitating transition to the labour market and financing research, to name only a few.

To my view, educational reforms gear the system towards conservative orientations, intensification of control and new managerial structures: the introduction of evaluation at all educational levels denote a definite turn from an education oriented to academic education to an education oriented to acquiring skills in order to continuously feed and sustain a person’s so-called employability. This is a trend prevalent in many European countries, and it seems that Greece finally is catching up, but to many authors this development constitutes a negative record.

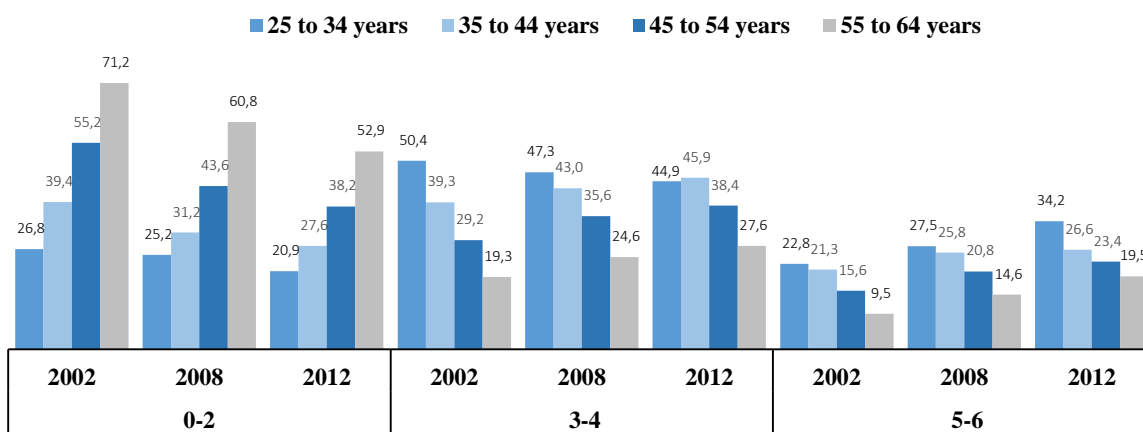
Annexes

Figure A1.2 Evolution of educational attainment (%), by ISCED and sex, between 2000 and 2013, in Greece



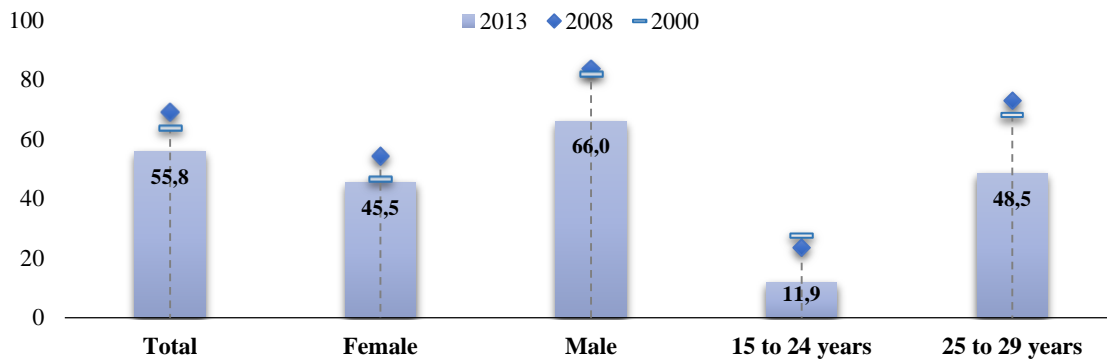
Source: Eurostat

Figure A1.3 Evolution of educational attainment (%), by ISCED and age groups, between 2000 and 2013, in Greece



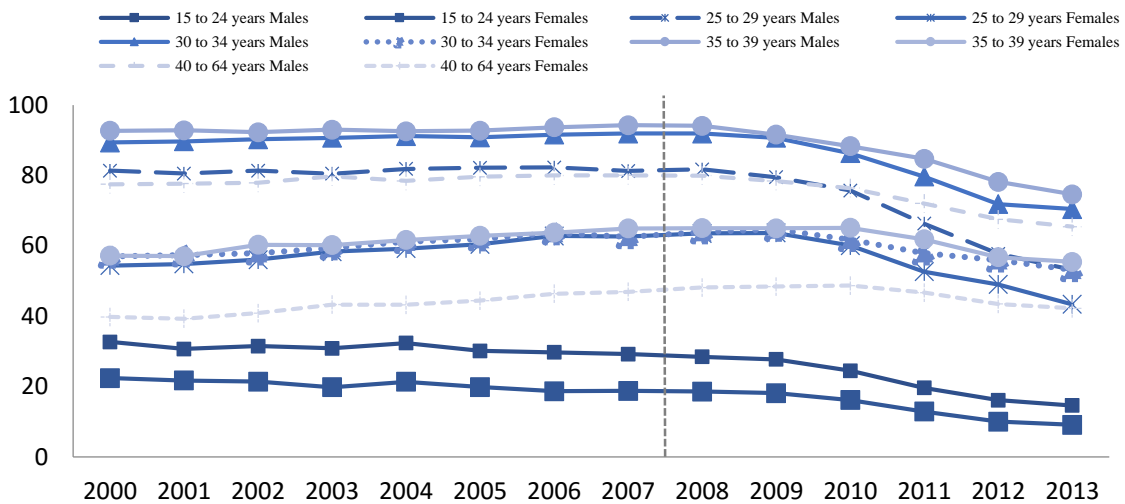
Source: Eurostat

Figure A1.4 Employment rate, in Greece (2000-2013)



Source: Eurostat

Figure A1.5 Employment rate of total population by sex and age range, in Greece (2000-2013)



Source: Eurostat

Table A1.1 Female and male employment rate by age and education level (2000-2013)

		ISCED 0-2		ISCED 3-4		ISCED 5-6	
		2000	2013	2000	2013	2000	2013
Female	25 to 64	36,6	33,5	48,4	42,4	74,9	63,8
	25 to 29	36,8	30,3	54,6	39,1	69,0	50,6
	30 to 34	43,0	37,6	52,8	48,0	79,2	65,5
Male	25 to 64	78,6	58,3	83,9	52,2	87,5	63,2
	25 to 29	83,5	66,8	81,9	52,3	90,0	70,2
	30 to 34	86,6	74,5	75,5	55,1	90,7	76,9

Source: Eurostat

Figure A1.6 Unemployment rate of total population by age range, in Greece

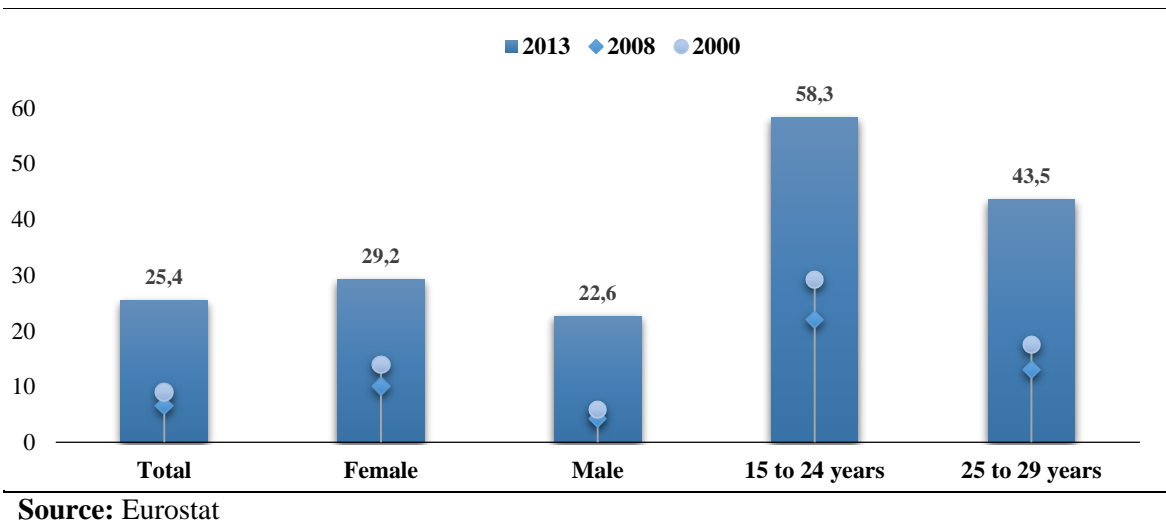


Figure A1.7 Unemployment rate of total population by age range, in Greece

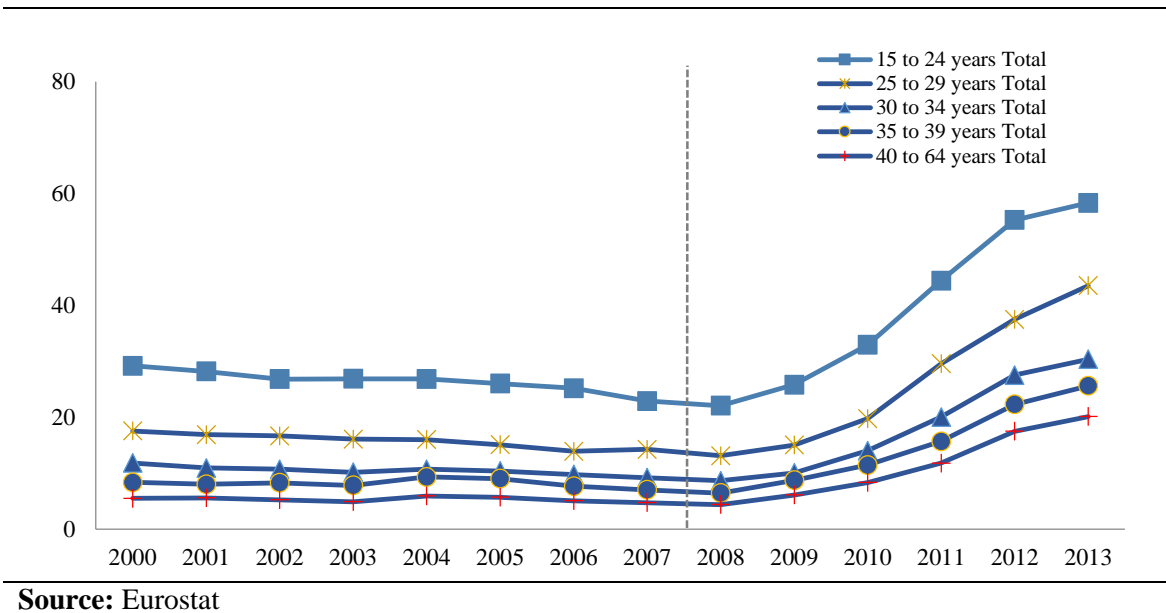


Table A1.2 Female and male unemployment rate by age and education level (2000-2013)

		ISCED 0-2		ISCED 3-4		ISCED 5-6	
		2000	2013	2000	2013	2000	2013
<i>Female</i>	25 to 64	13,2	30,7	30,0	50,7	22,9	42,8
	25 to 29	17,0	34,0	24,3	49,0	20,3	39,5
	30 to 34	10,7	22,7	22,5	44,6	12,2	27,8
<i>Male</i>	25 to 64	5,4	27,5	10,3	44,6	7,4	33,1
	25 to 29	7,0	23,3	12,0	39,0	7,8	39,5
	30 to 34	4,9	16,1	16,2	40,6	6,4	21,3

Source: Eurostat

Table A1.3 Gini Coefficient, in EU27 and Greece (2000-2012)

Source: Eurostat

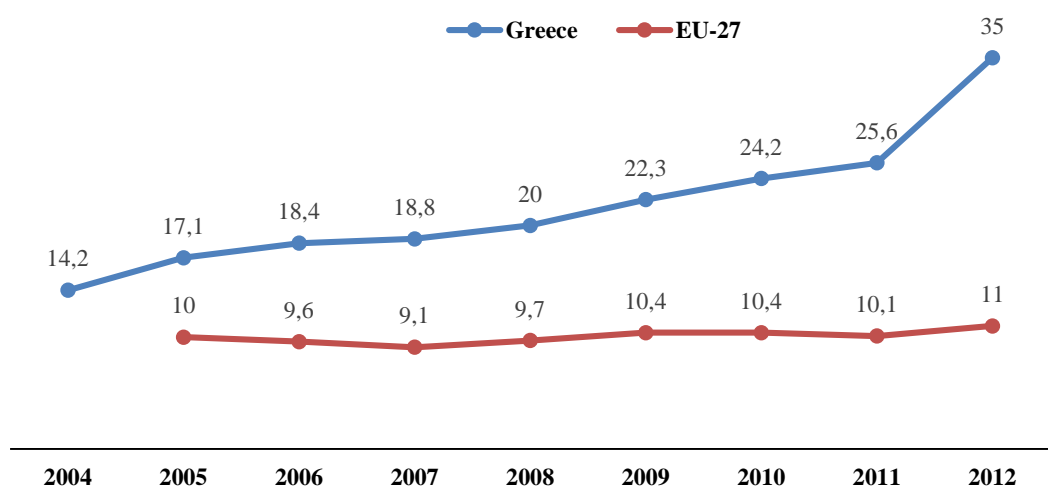
Table A1.4 At risk of poverty rate (cut-off point: 60% of median equivalised income after social transfers), in EU27 and Greece (2000-2012)

Years	Total		Males		Females	
	EU 27	Greece	EU 27	Greece	EU 27	Greece
2000	:	20	:	19	:	20
2001	:	20	:	19	:	22
2002	:	:	:	:	:	:
2003	:	20,7	:	19,9	:	21,4
2004	:	19,9	:	18,7	:	21
2005	16,4	19,6	15,6	18,3	17	20,9
2006	16,5	20,5	15,7	19,5	17,2	21,4
2007	16,5	20,3	15,7	19,6	17,3	20,9
2008	16,4	20,1	15,5	19,6	17,4	20,7
2009	16,3	19,7	15,4	19,1	17,1	20,2
2010	16,4	20,1	15,6	19,3	17,0	20,9
2011	16,9	21,4	16,1	20,9	17,6	21,9
2012	17,1	23,1	16,5	22,5	17,8	23,6

Source: Eurostat

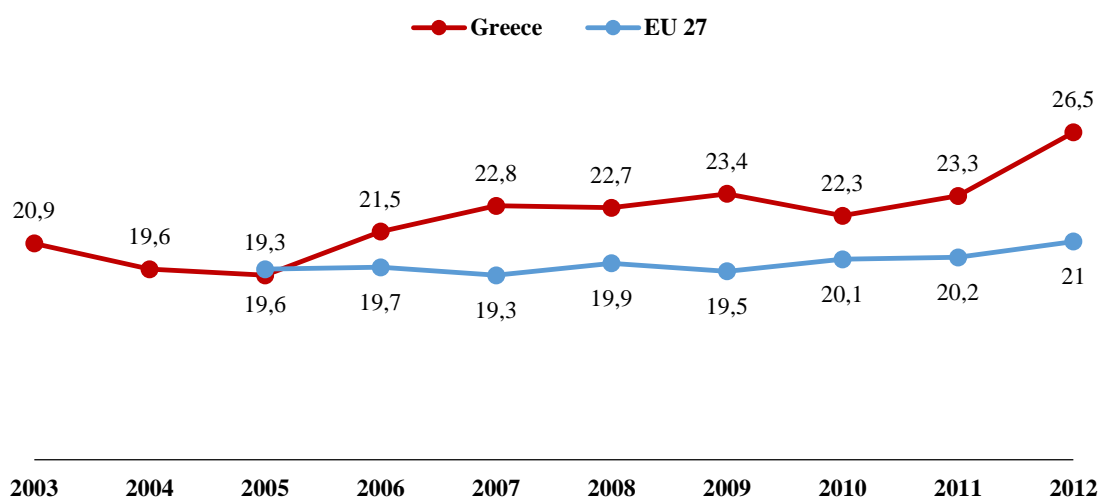
Note: : - Data not available

Figure A1.7 Inability to make ends meet in EU27 and Greece (2004-2012)



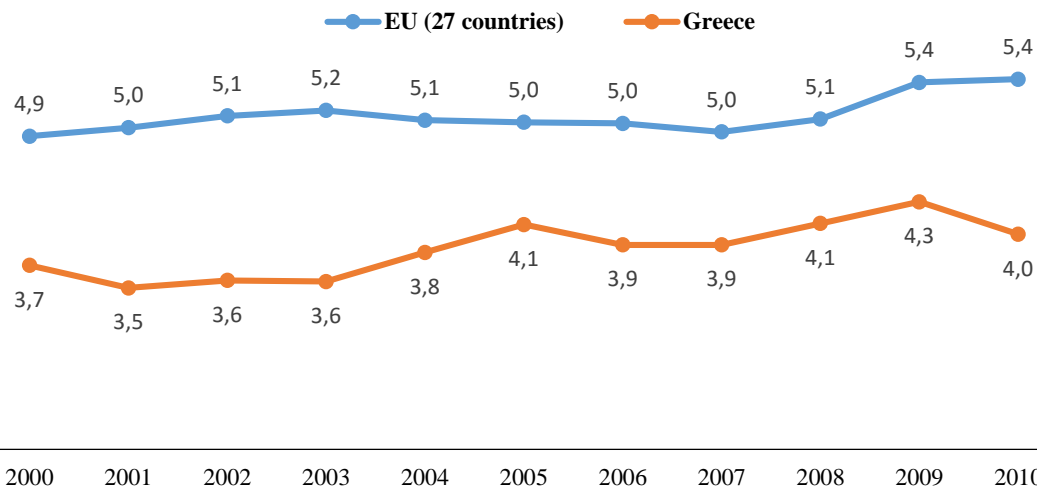
Source: Eurostat

Figure A1.8 Youth At risk of poverty rate (age less than 16 years), in EU27 and Greece (2004-2012)



Source: Eurostat

Figure A1.9 Public expenditure on education as % of GDP



Source: Eurostat

A2. The education system: a profile

The relevant diagram in the Appendix depicts the education system as follow (see Greek education system diagram):

ISCED 0-2 (International Standard Classification of Education): Primary schooling starts at the age of 6; though there is a possibility to start at the age of 4; however pre-primary education is not available to all kids in Greece.

ISCED 1-2: Primary schooling is mandatory from the age of 6 years old through to 14 years old. More analytically, three different schools make part of compulsory education: At the age of 4, a kid has the possibility for 1 year pre-kindergarten; at the age of 5, s/he has the possibility of 1 year kindergarten; at the age of 6 starts the primary education schooling and lasts six years; at the age of 12 starts the lower secondary school (called Gymnasium) and lasts 3 years till the age of 15. Compulsory schooling is 9 years (6 years attending primary and 3 years lower secondary education).

ISCED 3: it refers to upper secondary education called Lyceum in Greece: students are aged 15 and above (when they enter) and schooling lasts 3 years; students are then aged 18. There are two main tracks, the General Lyceum and the Vocational Lyceum (with the acronym EPAL); formerly it was called technical, later was renamed technical-vocational and the last years it is only called vocational. Both tracks lead to studies at tertiary education. In addition vocational schooling leads to non university higher professional education as well as to Grade free post secondary non-tertiary education.

In addition to vocational there are also at this level (2) the Vocational schools (EPAS) that lead to further vocational training at the ‘grade-free post secondary non-tertiary education’. Grade free means that such schools accept students from different levels of education (after the compulsory level) and that the degree obtained is not linked to a specific level of education. The degree in other words cannot be ranked according to a specific level of education.

Transition from one level of education to the next (primary and secondary) is unhindered and for some pupils (with good school records) fairly easy. The choice of enrolment to Lyceum (General or Vocational) is in the hands of pupil (and his/her family) and not in the hands of the school, at least not directly. Schools, for instance, do not issue an advice report for every student, as it schools do in other European countries, as for example in Germany or in the Netherlands. The grades however a student has received on his/her diploma of graduation serve as a standard by which enrolment is decided: lower grades usually mean that the student shall enrol in a vocational lyceum, while higher grades usually denote enrolment in a general lyceum.

It is worth noting that technical-vocational education is considered of lower status, as we mentioned in a previous section, and is attracting generally speaking the ‘less able’ students; this constitutes a trend similar to other countries in Europe.

ISCED 4: It is reserved for post-secondary education that in Greece as elsewhere consists of vocational training.

ISCED 5B-5A: Tertiary education is in Greece university education comprising Universities, Higher Technological Educational Institutes, and Higher Professional Education. Studies last customarily 4 years, with the exception of medicine (6 years) or engineering (5 years). Studies lead to obtaining a bachelor’s degree.

Selection of students takes place at the port, i.e. at the entrance to higher education through exams called Panhellenic as mentioned in the previous section. Panhellenic exams are held every year and they are broadcasted widely by the mass media.

ISCED 6: at this level, studies that lead to a master’s degree last customarily 2 years, while to a doctorate degree last a minimum of 3 years.

Students with disabilities attend schools set up for this purpose since 1996, prior to this, the were schools being set up by civil society organisations. Adult education: those who have attained no formal qualifications from the mandatory schooling may attend a ‘School of Second Chance’ as these are called. This kind of schools are only situated in cities and in 2013 there were 58. There is no available adult education at upper secondary

education, nor special courses or entrance exams to enter higher education. If adults wish to study further they have to sit the same exams as the 18 years old just completed Lyceum (commented also by Prokou 2014a, see also 2014b).

Working pupils/students at secondary education: there is a provision for working students and adults. Their education is taking place in Evening Schools available in towns and cities, since the 1930s.

Intercultural education is also available since 1997 but to a limited number of students; there are 26 such schools all over Greece.

In short: tracking is limited and it takes place indirectly, throughout primary and lower secondary education; students' differentiated achievement is labelled by school and family as 'less able' and therefore students should 'better' follow a less demanding track, which implies studying at a technical-vocational Lyceum; the technical-vocational track therefore it tends to attract the low achievers.

Studying at all levels of education is free of charge with the exception of some post-graduate studies at master's level. At this level, some universities have issued already tuition fees. Textbooks are also free of charge at every level of education (except post-graduate studies) and at university level, students are entitled only a free text book for every course they need to complete successfully for graduation.

Pupils support and allowances at primary and secondary education:

Pupils are entitled to text books and other school material free of charge and the possibility of free transportation, if the school is situated far away from their home place (Eurydice 2007/08: 26, 35). For disabled students: there are regulations for free transport from school to home and vice versa Families are entitled an allowance for expenses in case the state does not provide the means, but this is at the discretion of the Prefecture (ibid.: 26).

Student support and allowances at tertiary education:

All students are entitled free textbooks (Eurydice 2007/8: 98). The use of the university library and other facilities, such as for example sports, foreign languages or attending cultural activities and taking part in conference organised by higher education institutes also are free of charge.

All students at university level are equipped with a 'student pass' that entitles them

a 50% discount to public transportation at the city of their studies, and a discount to travel elsewhere in Greece (varying from 10% to 30%).

In addition to the above, students with limited financial means may be entitled to a) transfer their studies from a far-away university and continue to the similar department of their home town b) to a rent room/flat allowance (usually up to 1000 euro per year) and c) a meal (per day -up to a certain amount in monetary terms) (KANEP/GSEE 2013: 57).

Access to university studies without taking the entrance exams is reserved for a limited number for particular categories of students: for example, students with severe disabilities, Greek nationals who come from other countries and sport athletes with extraordinary achievements in international competition games. In general, the Greek education system is characterised by an egalitarian orientation. This however does not mean that there are not any inequalities related to social class, gender, migrants, and other student categories as research shows (see Kantzara 2006b, Sianou- Kyrgiou 2006, 2010a, 2010b).

Teachers

In relation to teachers' posts: from the available information teachers' corps before the onset of the crisis has been steadily increasing, but after 2010 is being decreasing. The available statistical information are detailed for the period that the teachers' corps was increased but the information is rudimentary when it started decreasing. I examine first the increase.

Between 2002 - 2007, teachers' corps including the academic staff was increased by 13.000, according to the Eurostat statistics (from 189.128 in 2004 to 202.014 in 2007). The increase is taking place gradually every year and at every educational level, with the exception of pre-primary education, in which only a 100 more kindergarten teachers were employed between 2004 and 2007.

More specifically, pre-primary education teachers (level 0) were about 12.000, primary education teachers (level 1) were about 62.000, secondary education teachers (level 2-3) were about 86.000, post-secondary teachers (level 4) about 12.000, and tertiary education teachers and academic staff (level 5-6) were about 28.000 (see Section A.2 Indicator 1 Teachers, in Appendix).

After 2010, teachers' corps was decreases however by 27,3%, including all categories of teachers at secondary education (level 2-3) according to the Secondary

Education Teachers' Union (called OLME) and announced during a Press interview on 10-9-2014; the press interview was published in for instance online news services (www.news.gr, www.esos.gr).

The following tables are based on the information on the aforementioned sites.

Table A.2.1 Reduction of Secondary education teachers' corps, per category of employment (2010-2014, June)

Teachers/employment Category	2010	2014	Change	In %
Permanent	94.264	71.346	-22.198	- 24,3
Substitutes	3.829	2.091	-1.783	- 45,4
Part-time	5.950	2.156	-3.794	- 63,7
Total	104.043	75.593	-28.450	- 27,3

Source: OLME 2014 in <http://www.esos.gr/>

More particularly, according to the table above there are three categories of teachers employed, permanent, substitute and part-time: the permanent teachers' corps decreased by 24,3% (in total numbers by 22.918, i.e. from 94.264 in 2010 to 71.346 in 2014 (June)). The decrease of substitute teachers at secondary education was 45,4% (from 3.829 in June 2010 to 2.091 in June 2014); and the part-time employed teachers decreased by 63,8% in the same period (from 5.950 teachers in June 2010 to 2.156 in June 2014) (Press interview of OLME – secondary education teachers' union- in www.esos.gr/arthra/defterovathmia-ekpaidefsi/eidisisdefterovathmiaekpaidefsi/pinakes-me-th-meivsh-ekpaideytikvn-kata-eidikothta-thn-teleytaia-tetraetia ; see also Kalogiros 2014).

In

addition, there is a decrease of teachers in other educational levels, for instance due to pensions. An article by an education researcher published in a newspaper, mentions that according to his statistical information, the percentage of primary education teachers decreased by 8,43% between school year 2009/10 and 2014/15 (in total numbers respectively from 74.518 to 68.235) (Katsikas 2015). Other statistical information is difficult to obtain.

In relation to teacher's salaries: in both public and private schools basic statutory salary is calculated using the same method (Eurydice 2013/14: 6). Teacher's salaries in primary and secondary education are similar and between 2010 and 2013 were reduced more than once: the reduction of the salaries and pensions was introduced by the law 3833 in 2010 and by the law 4024 in 2011 (Eurydice 2012: 40). In the law of 2010 there was a reduction of 12% in allowances and salaries and 30% reduction in other 'regular' payments (ibid.: 40). Thus, in 2013-14, the minimum teachers' statutory basic salary was 13.134 euro per year and the maximum 24.756 euro (Eurydice 2013/14: 46). The reduction is estimated as being between 35-38%, while taxation, both direct and indirect (e.g. VAT) has risen. OECD estimates the reduction as follow: "gross salaries fell by 17%" (OECD 2013). Admittedly, Greek teachers are lower paid than their colleagues in the EU 27 countries, whose average salary was 24.205 euro per year (lower secondary education) and 25.404 euro per year (upper secondary education) (Fryktooria 2012: 1 based on Eurydice 2011/12 report).

Student population

Between 2000 and 2011, students have increased in total numbers by about 147.000 (from 2.031.340 in 2000 to 2.178.296 in 2011). It is interesting to note that the increase is not steady and gradual. In two consecutive years 2005 and 2006, for example, student population was higher than in 2011 by 15.000 and 6.000 respectively (2.194.230 in 2005 and 2.184.995 in 2006).

From the student population, more than a million is men (peak year 2011, they were 1.121.608) while women students amounted to under a million in 2000 and reached just over a million in 2011 (peak year 2005, women students amounted to 1.078.441).

The reason why 2005 and 2006 there were more students, to my opinion relates to the Olympic games that took place in Greece in 2004 and the political and economic climate was in general more optimistic than after the onset of the crisis. The population, that is was 'warmed' up to follow a study as it promised a way out to employment.

The total numbers of youth studying has increased, but if we look at specific age categories then there is a decrease: between aged 6 and 14 there is in every age category a decrease culminating between 0.2% to 1,5%. In the age of ‘14 and less’ there is a decrease of students that is more than 5% (from 56,7% in 2000 to 51,1% in 2011); the age category 15-19 has a decrease of more than 11% (from 30% in 2000 to 21,7% in 2011) (see Section A.2. Indicator 1 Students, in Appendix).

Adult students have decreased as well by 1% (from 13,3% in 2000 to 12,3% in 2011) while between 2006 and 2010 they had reached a percentage of about 25%. Students under 20 years old decreased –steadily- during the same period by about 14% (from 86,7% in 2000 to 72,8% in 2011).

The age category of students that has remarkably increased is, the age of ‘25 or older’, who amounted 30.047 in 2000 and reached a total of 307.184 in 2010; in addition the age category of ‘25 to 29 years old’ among whom students were 30.198 (in 2000) and reached up to 289.222 (in 2010) made sure that the total of students seems to have increased.

The most remarkable fluctuation is also to be seen in the age category of ‘30 to 34 years old’ who increased from about 1.918 in 2000 to 17.962 in 2010, but in between they reached numbers that exceeded the 100.000 (in 2005, 2007, and 2008-in this year more than 146.000).

In relation to gender: men students increased by 0,6% (from 50,8% in 2000 to 51,4% in 2011, and women students decreased by 0,6% (from 49,2% in 2000 to 48,6% in 2011) (see Section A.2 Indicator 1 Students, in Appendix).

In relation to nationality: in 2011, foreign students were 5% of the total population and this percentage is higher than other OECD countries in the region and followed by Italy (4%) (OECD 2013).

Schools

After 2010 the number of schools has decreased in a quicker pace than before. More particularly: between 2001 – 2010, the number of schools decreased by 71 units; the following years, 2010 – 2014, the number of schools decreased even further by 1590 units.

Table A.2.2a Number of schools 2001-2010

	2001	2010	Change
--	------	------	--------

Kindergarten	5.624	6.064	440
Primary schools	6.094	5.440	-654
Gymnasium (lower Secondary education)	1.870	1.965	95
Gen. Lyceum (upper Secondary education)	1.289	1.361	72
Vocational education	640	616	-24
Total	15.517	15.446	-71

Source: KANEP/GSEE 2013a, pp. 4-8 (based on statistical data from Hellenic Statistical Authority-ELSTAT).

The number of schools in ten years decreased primarily, because primary schools and vocational schools merged or closed down; the schools on the other educational levels increased slightly, with the exception of the kindergarten that increased by 440 units.

The explanation that is given for the increase of the kindergartens is that it is related to the law application in 2006 that decreed attendance to the kindergarten as compulsory (KANEP/GSEE 2013b: 16).

Statistical information for the following years has not seen the light of publication yet. Estimates appear in media reports and there it is mentioned that there is a decrease of 1590 school units after 2010. According to the education researcher Katsikas (2015), the details are as follow:

Table A.2.2b Number of schools 2010-2014

	2009/10	2013/14	Change
Kindergarten	5.700	5.151	-549
Primary schools	5.098	4.331	-767
Gymnasium (lower Secondary education)	1.873	1.656	-217
Gen. Lyceum (upper Secondary education)	1.265	1.209	-56
Vocational education	389	388	-1
Total	14.325	12.735	-1.590

Source: Katsikas 2015 (based on statistics from the Hellenic Statistical Authority-ELSTAT)

Here I should note that there is a small discrepancy between the aforementioned tables as to the number of school units referring to vocational education and affecting the total of school units. In table A.2.2a, vocational training includes all schools (private and public) that offer technical-vocational training, which amounted to 616 units in 2010 (KANEP/GSEE 2013b:32). In the following table, A.2.2b, the vocational lyceum refers

only to the public school units (389 units in 2009/10).

Formal education at the first and second level of the education system in Greece is predominantly public. According to the report of KANEP/GSEE (2013: 18-36):

- 93,3% of kindergarten is public and 6,7% private
- 93,3% of primary education schools is public and 6,7 private
- 94,6% of Gymnasia (lower secondary education) is public and 5,4% private
- 87,6% of General Lycea (upper secondary education) is public and 5,8% private
- 97,4% of schools in vocational education is public; while at technical-vocational education level a percentage of 12,6% is private.

Note: on the whole, private education has been decreasing according to the above mentioned report.

Higher education in Greece is exclusively public (ibid. p. 66); this does not mean however that there are no private institutes; these are called colleges and usually with the franchising system offer studies that are completed at least a year abroad (at the university that the colleges are affiliated with) so that the students could get their diploma's accredited according to the Greek law. During the same period 2001-2010 tertiary education consisted of 24 Universities and 16 Higher Technological Institutes (TEI). Downsizing of tertiary education started in 2013. The ministry of education conceived of the "Plan Athena" and tried to implement it, starting in 2013. In 2013, there were 534 departments, which would be decreased to 384 (i.e. -150) (www.minedu.gov.gr/publications/docs2013/130305_telikh_protash_athhna.pdf), p. 38.

From the 384 departments, 134 would be in TEI and 250 departments at the Universities. Eventually, one University closed (instead of 3 planned) and in the academic year 2013-14 there were 261 University departments according to the ELSTAT (Hellenic Statistical Authority - www.statistics.gr). Information on TEI lacks at the aforementioned data base.

Thus, eventual merging and closing of departments was not implemented to the degree that it was planned also due to the reaction of students and faculty at universities and TEI.

Level of educational offer in terms of vacancies and number of schools

Educational offer as well as teachers' appointments in the public sector is on the whole organised and implemented by the Ministry of Education. Every year, we read in newspapers report of vacancies not filled; after 2009 the relevant numbers have increased. Information is as usual hard to find and the different parties (teachers and Ministry, or even political parties) publish different numbers as to posts not filled with teachers.

The structure of educational provision

The structure of the Greek education is in relation to its European counterparts fairly simple and on the whole linear. As it is explained in the previous section the transition from primary to lower secondary is fairly available to all students. There is no selection at the port of the Lyceum (upper secondary education) by the school. Students choose themselves (with their families) whether they will attend general lyceum or a vocational one. Significant student selection one finds at the entrance to higher education. As it has been explained above and in the previous section, the Panhellenic exams forms the main avenue available to students through which entrance to the university and TEI is regulated.

Participation enrolment in education

Between 2000-2012, the total percentage of students increased. Taken per age category, students aged 15-24 (as percentage of population) has increased by 10,8% (from 53,6% in 2000 to 64,4% in 2012); the exception in the trend are the years 2005 and 2006 that the percentage of the population of students in the population was higher, namely 66,2% and 66,8%, respectively. Between the years 2000-2012 both young men and women (aged 15-24) increased their participation in education by 10%.

The other age categories also have increased their enrolment in education. The bulk of students enrolment as percentage of population is at the age of 16-18 years old and the enrolment has increased by almost 7% (from 79,3% in 2000 to 86,8% in 2012). There is a fluctuation in years, 2005-2006 the total percentage was more than 90% of the same age population in Greece. Interesting also to note that girls reached a percentage of 94,5% and 96,1% in 2005 and 2006.

The student population that increased more than any other are at the age category of 22, 24 and 25 years old; more specifically, those aged 22 increased by 15% (from 17,8% to 42,8% in 2012); those aged 24 increased by 19% (from 7,5% to 26,2% in 2012); and those aged 26 increased by almost 15% (from 4,1% to 19,2% in 2012).

On the whole, we can see that both women and men have increased their

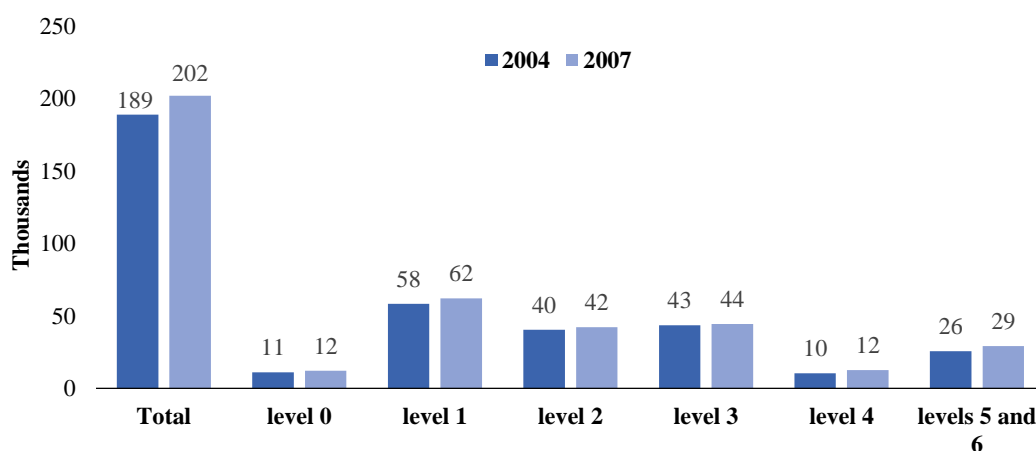
enrolment in education in a comparable way (see Appendix, Section A.2 Indicator 5-6).

Conclusion: the structure of the education system is fairly simple, and by this I mean that it is not complicate in terms of tracking or streaming as well as in terms of endless different routes to tertiary education. This fairly simple (structure) and the policy that permits studying to low income families (i.e. studies free of charge and textbooks gratis) indicates that the education system has an egalitarian character. However, the effects of the crisis show that this egalitarian character comes under pressure, for schools units have closed down, and the effects of this are to be studied; next, teachers are driven away, while of those remaining in education, the remuneration has been considerably reduced.

There is no indication however about the quality of education being touched upon, for as it happens in other countries, citizens' resilient capacity has already become apparent, as other studies show.

Annexes

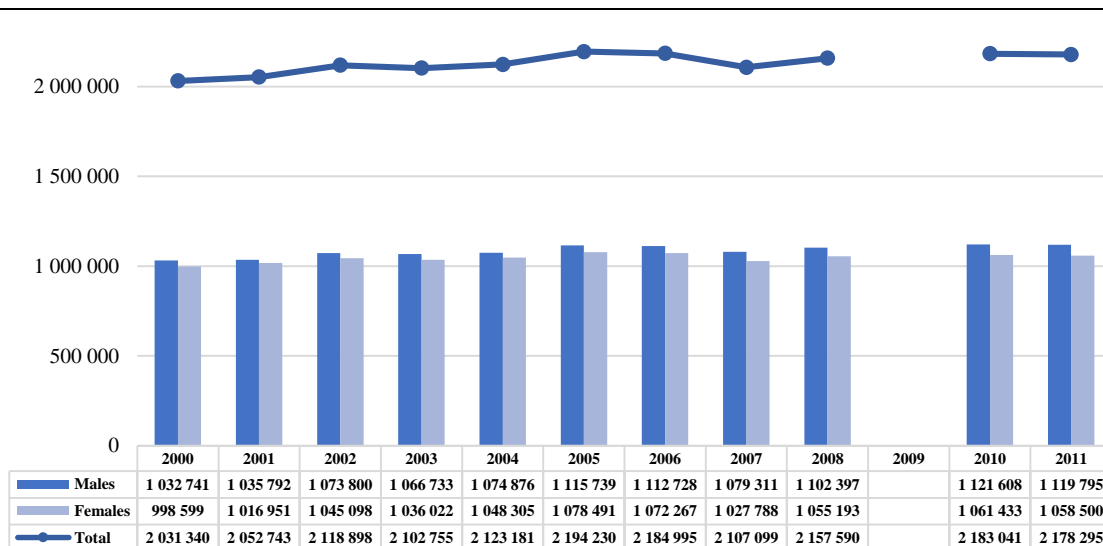
Figure A2.1 Number of teachers (ISCED 0-4) and academic staff (ISCED 5-6) by educational levels, in Greece (2004-2007)



Source: Eurostat

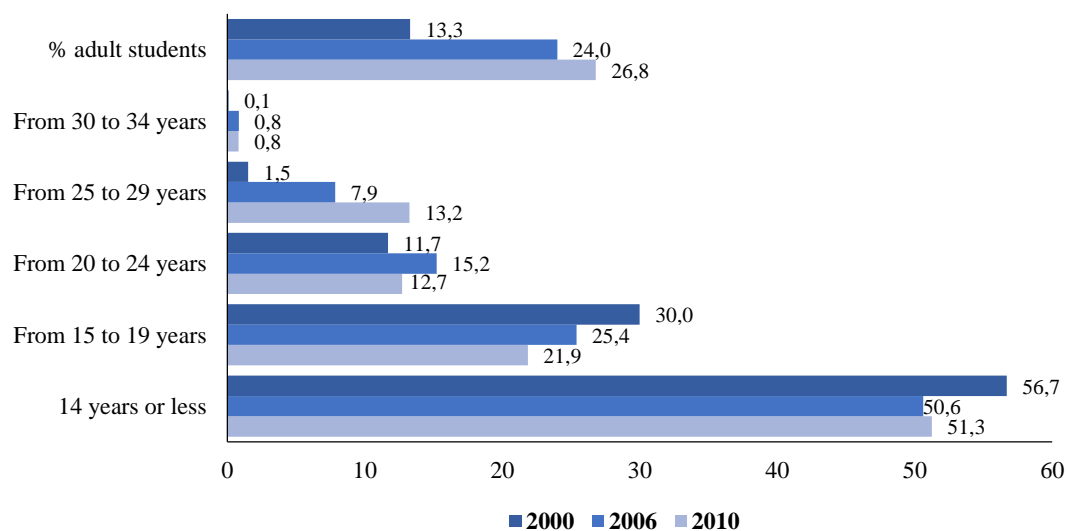
Note: Pre-primary education (level 0); Primary education or first stage of basic education (level 1); Lower secondary or second stage of basic education (level 2); Upper secondary education (level 3); Post-secondary non-tertiary education (level 4); First and second stage of tertiary education (levels 5 and 6)

Figure A2.2 Number of students, in Greece (2000-2011)



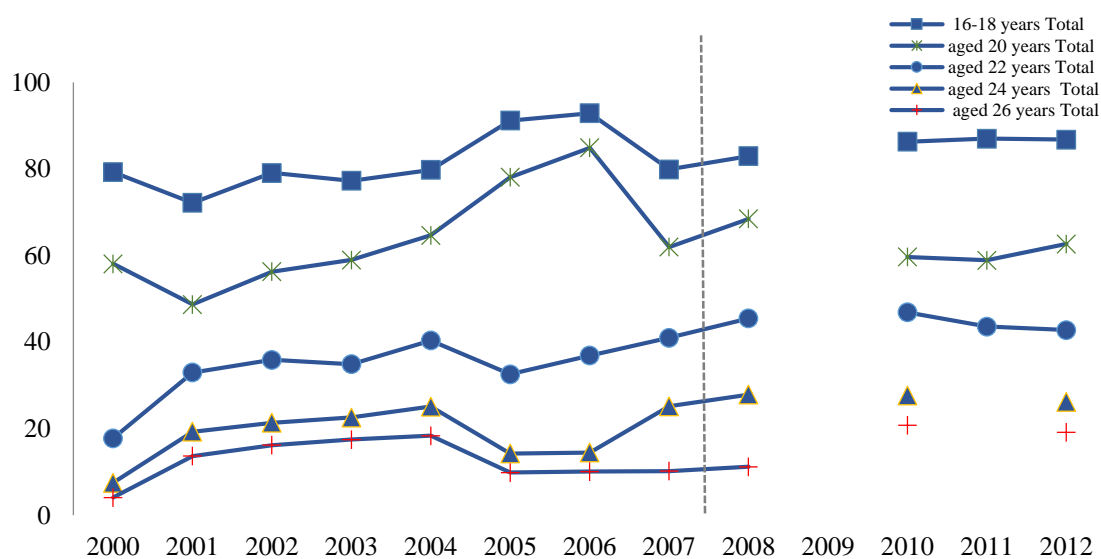
Source: Eurostat

Figure A2.3 Number of students, by age groups, in Greece (2000-2010)



Source: Eurostat

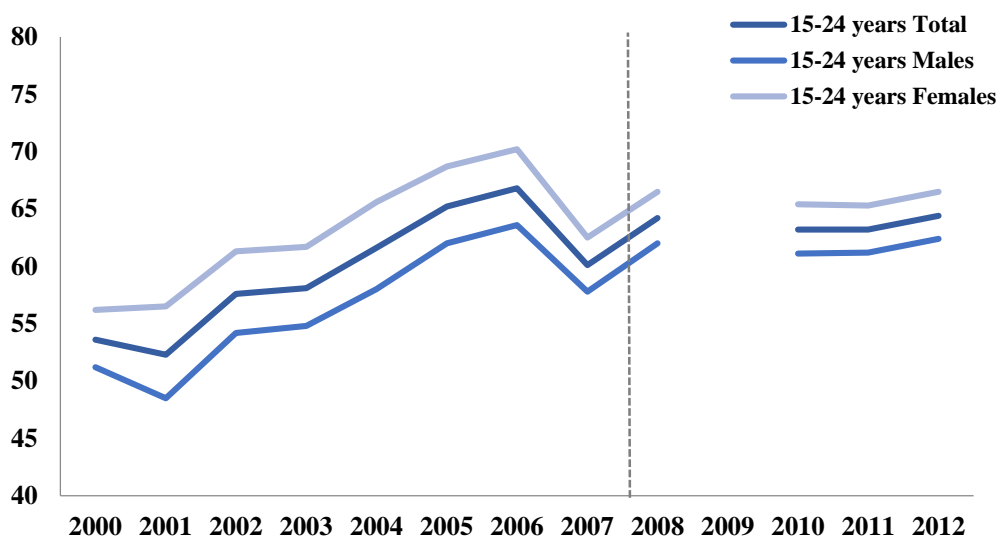
Figure A2.5 Participation/enrolment by age groups, in Greece (2000-2010)



Source: Eurostat

Note: No data available for 2009

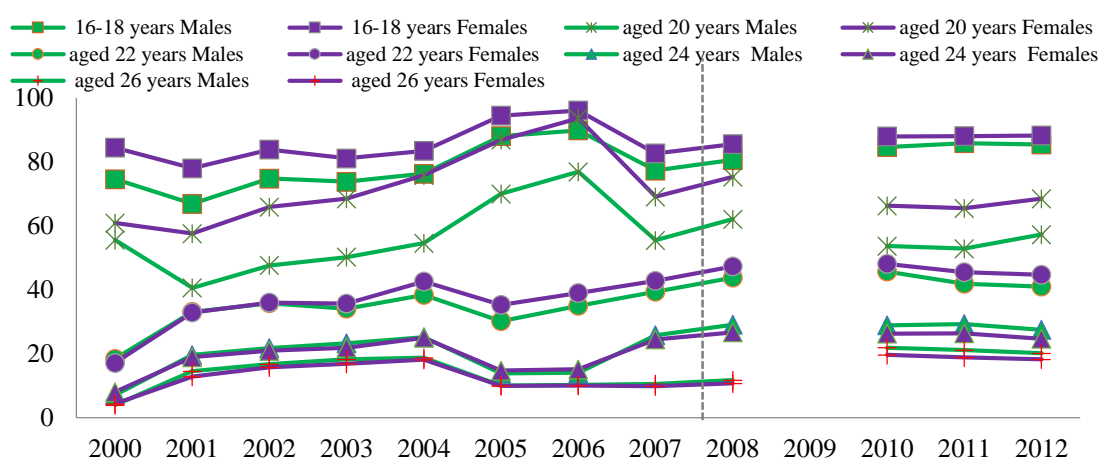
Figure A2.4 Participation/enrolment by sex (15-24 years), in Greece (2000-2010)



Source: Eurostat

Note: No data available for 2009

Figure A2.6 Participation/enrolment by sex and age groups, in Greece (2000-2010)



Source: Eurostat

Note: No data available for 2009

A3. Processes and mechanisms of monitoring and evaluating the education system

The education system in Greece at least formal education is wholly managed and controlled by the ministry of education. There is little autonomy given to schools and these only refer to extracurricular events and other such activities. In other words, curriculum, school hours, holidays, personnel, and all other aspects of the education system are decided by the Ministry of Education; the administration locally of the education system follows the administration division of Greece in Prefectures, cities and towns.

Higher education follows a similar vein. In higher education though, the institutions have an educational autonomy, that is, decisions in regard to the content of the study programme, and decisions on academic staff (selection, career advancement, and various academic leave of absence). All decisions made at institutional level and carries a financial weight have to be approved by the Ministry of Education.

In regard to monitoring: The Greek education system has been monitored according to the principles of public management until today; the lack of autonomy at a large scale goes today hand in hand with evaluation perceived more as an instrument of

control than of attempting to improve the education system. Changes related to evaluation and quality assurance were introduced in 2005 and 2007 and started being implemented at a large scale after the law 4009/2011. According to laws of that period, 3374/2005 and 3549/2007, terms such as quality assurance were introduced and the institution that would carry out the evaluation (KANEP/GSEE 2013: 53, Prokou 2014b: 66-69).

Higher education has specifically been targeted as needing evaluation in 2011. The turn of the other two levels of education came later, in 2013. The law, which is Greece is denoted by a number followed by year of publication is in this case 4009/2011.

According to this framework law a host of new changes were introduced among others an independent organisation, called Hellenic Quality Assurance and Accreditation Agency - HQA (the Greek acronym is ADIP). This institutional body was set up in 2006 and it is entitled to plan and carry out the task of setting criteria and reporting of the evaluation process of tertiary education; at a later stage, the plan is to start accrediting the study programmes at higher education level.

In terms of the procedure to follow: the internal evaluation of every department is followed by an external one. The relevant committee of the external evaluation is comprised by academics from universities abroad, who understand the Greek language; if they do not understand the language then the texts have to be translated into English. It is worth mentioning here that both draft and final version of the evaluation report is not written in the Greek language but in English. Additionally, all the relevant reports are published on the internet page of the institution (see www.hqaa.gr).

The aforementioned institution has carried out its tasks, but amidst students' and faculty members' protests. For the evaluation work, funds were made available, as well as for other administration structures that are new within higher education.

In addition, evaluation does not include departments or universities, but it extends to evaluation of personnel that it has been planned, but partly implemented, with the exception of academic staff members, who are being every year evaluated by their students since 2011. The plan for evaluating public servants remains to be carried out, together with the administration personnel in schools and teachers of the other two educational levels.

Evaluation has been the subject of vehement debate. Some consider it a means to control education, to enforce conformity, to punish those who disagree with the decisions of the education authorities, or simply who are different from their department heads or

school directors. The issue is being discussed and it continues to be a subject of dispute till the time of writing up this report.

In the words of an education policy expert:

“Research in the European context has shown that quality assurance policies (strongly promoted by the EU) are associated with reduction of public funding due to the withdrawal from welfare states... It is therefore important that the social actors (academics, students etc.) resist the above policies through their active participation in decision making both in national and international contexts” (Prokou 2014a, expert interview, 2-12-14).

The views expressed above at least in Greece go hand in hand with the opinion that evaluation could be a means to be used in order to improve quality, but it has to be done differently than the one promoted by the Ministry of Education. According to the education expert, an evaluation system has to be set up after all:

“However, it is equally important that they work towards a coherent system of evaluation of higher education institutions, which will emphasise peer reviewing and internal forms of evaluation, leading to quality with reference to the rules of the different disciplines, otherwise “university work” (instead of “university productivity”). This is a major challenge for the Greek universities, which do not have a long tradition of an evaluation system. Academics should assure, in intellectual and disciplinary terms (not in terms of “market responsiveness”), the quality of the institutions they serve, by being involved in the improvement of the evaluation framework” (Prokou 2014a, expert interview, 2-12-2014.).

Taking a step back: in general it is not clear, how primary and secondary education is being controlled: there are no official reports written, unless a director of a school or a school advisor drafts one because s/he wants to point to a problem. The responsibility of running the education system lies with the ministry of education; this concentration of power becomes problematic: such is the case with the PISA results, in which Greek students do not perform so well; in such a case, there are no formal organisation structures responsible to carry out a discussion, only the ministry of education could issue a report or plan a study into this.

The criticism addressed to such a concentrated system is manifold. It is worth noting that the law of 1985, which was considered a landmark for introducing democratic

structures of governance in schools, permits various civil society and professional organisations (e.g. farmers', workers', middle business' etc.) to write reports or recommendations addressing them to the education authorities. This seemingly democratic measure, means according to some authors that actually no one has the responsibility to do so (see Kantzara 2001: ch. 3).

A significant part of running an education system is to have statistical information. Availability of statistical data has been improved considerably after 2012; part of it is due to the measures issued conforming to the 'Memorandum of Understanding' agreement with the troika which promotes 'transparency' in the public sector. Still statistics are not up to date on a number of subjects, and most notably on education.

A note on transparency: it was thought that one of the main mechanisms to combat corruption and facilitate public control over finances and other aspects has been to make public every decision made by public authorities; for this purpose there is a site on the internet, called 'diaygeia' (transparency). This measure has already bared some fruits as very often one can read articles that judge public spending, but this is another issue and we put aside for the moment.

Teachers, though an integral part of the education system, in Greece, it looks as though they are treated as a 'necessary evil': in general, they are lowly paid, their work is not highly estimated by education authorities, and their opinion is not asked whenever education reforms are planned. They do keep a necessary degree of autonomy to carry out their work. It is no wonder that teachers' reaction to the planned evaluation was massive and negative. Issues, such as recruitment and in-service training that I mentioned above in the previous section continue to be a matter of concern, for on the whole are evaluated as 'insufficient'.

In relation to student's performance at an international level by which the system could be indirectly evaluated: apart from the PISA study, Greece does not participate in other international assessments, such as TIMMS (Trends in International Mathematics and Science) that studies trends in competencies in mathematics and physics at the last year of secondary education, nor at PIRLS (Progress in International Reading Literacy Study) that documents trends in reading comprehension at fourth grade of primary education (more details, see at timmsandpirls.bc.edu).

In short, until 2007 the Greek education system is monitored and managed according to the principles set by public management. After 2011, new laws plan different management structures (some of which we mentioned in subsection III above), and

introduce evaluation as an instrument for quality assurance, according to international standards. However, due to the past uses of the instrument of teachers' evaluation, today it is still perceived as a means of control, enforcing conformity and punishing rather than as a means of improving education.

B. Crisis and its effects on education

In this part, the focus is on the impact of the crisis on aspects of the education system related with equality of opportunity and securing access and success in learning.

B1. Equity: Policies and achievements

The Greek education system, as mentioned above, has a strong egalitarian character as it is for instance expressed in the lack of tuition fees and other aspects that facilitate studying.

Percentage of students with schooling social support-Expenditure per student (as % of public expenditure)

There is no available data in Eurostat and in ELSTAT data bank showing percentage of students with schooling social support. The report of KANEP/GSEE mentions that financial aid to students in 2008 was 1,4%, placing Greece in the 30th position (of the 31) among the countries that participate in the common area of tertiary education (KANEP/GSEE 2013: 57).

Expenditure per student: the available data shows financial aid to pupils as percentage of total public expenditure on education.

Financial aid to pupils as percentage of public expenditure is minimal at all levels of education comparing with European countries: in EU27 financial aid was increased by 2% (from 5,2% in 2000 to 7,1% in 2010) while in Greece during the same period it was reduced from a total of 1,5% in 2000 to 0,6% in 2005. There is no available data for the following years 2006-2011.

At primary education financial aid remains unchanged (0,2%) while in tertiary education it was reduced by more than 4% (from 5,8% in 2000 to 1,4% in 2005) (see appendix section B.1 Indicator 1)

This means that the increase of student population in 2005 meant sharing the same resources.

In Greece the available data is until the year 2005. From the available statistics the difference between European countries and Greece is striking: European countries spend 7,1% of the total public expenditure on education to students at all educational levels, while in Greece it is less than 1% (namely 0,6%).

Expenditure per student (GDP)

Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents:

The available statistical data show an increase of 2,3% (from 2001 to 2005). There is no data after the year 2005 as there is no official data for expenditure on education after the aforementioned year (see above, section A.1).

Pre-schooling enrolment

According to the data, preschool enrolment, at the age of 4 years old has been increased by 1% between 2000 and 2012; in 2012 more than the half of kids (54,5%) aged 4 were enrolled at a pre-schooling education institute.

Children aged 5, may attend the kindergarten in which enrolment is mandatory and reaches up to 95,6% of the total population in 2012 (an increase of almost 14% from 2000), while children who are older, 6-7 years old are in the minority (1,0% in 2012).

By the boys aged 4, the enrolment rate has not altered (53,8% at the same period);

while enrolment at the age of 5 has increased by almost 16% (from 80,9% in 2000 to 96,2% in 2012); while girls' enrolment rate surpasses that of boys by 2% at the age of 4, but it is less than boys at the age of 5 (94,9% in 2012); girl's enrolment rate at the age of 6-7 years old is also less than boys' (0,6% in 2012).

In relation to the total students enrolled, boys at pre-schooling level remain steady throughout the period 2000-2012 at about 50%, (girls less, 49%); at the age of 5 boys comprise more 51% of the total student population, while girls are even less than those enrolled at age of 4 namely 48,6%; at the age of 6-7 years old, boys comprise 67,4% of total students enrolled at this age in pre-school enrolment, while girls' enrolment rate has decreased by more than 6% (from 38,9% in 2007 to 32,6% in 2012) (see Appendix, section B.1, indicator 3).

Participation of children with disabilities

The data from ELSTAT (Hellenic Statistical Authority) covers the period of 2001 to 2006, in which years there is an increase of students, school units and teaching personnel.

In 2001, at primary and secondary education, in public education: there were 4.441 students, and 201 schools; in private education there were 2.724 students and 51 schools.

In 2006, at primary and secondary education, in public education, there were 5.840 students and 287 schools; and in private education there were 2.789 students and 53 school units (www.statistics.gr/portal/page/portal/ESYE/PAGE-themes?p_param=A1404).

From the above data, one can see a clear increase of school unit reserved for students with disabilities. The Greek statistical service provides on its internet site no other statistical information; so data about the development of schools and students after the onset of the crisis is lacking. From personal information I know that schools have closed down or merged.

The second issue here is that there is no information about whether the existing schools suffice to house and facilitate enrolment of all children with disabilities. In other words, it is very probable that not all children in Greece with disabilities attend school at compulsory level.

Participation of students with ethnic minority background, immigrants & descendants of immigrants

At primary and secondary education the available data comes from ELSTAT and it is worth noting that information on repatriates that is Greek nationals are collected together with 'foreigners'.

According to the data, there is an increase of foreign pupils/students in schools between 2007 and 2011. More particularly, in 2007, the foreign and repatriate pupils were 70.594 (5.239 repatriates, and 31.018 girls).

In 2011, the foreign and repatriate pupils were 79.057 (3.642 repatriates, and 35.973 girls) (www.statistics.gr/portal/page/portal/ESYE/PAGE-themes?p_param=A1401).

Between 2007 and 2011, there is an increase of foreign students, and boys outnumber girls, but there is a decrease of repatriate Greek nationals.

At tertiary education level, as it is mentioned above, 5% of students are foreigners, which according to OECD is the highest in the region (OECD 2013).

Early school leaving (drop out)

On the whole, early School Leaving (ESL) has been reduced by 7% (from 18,2% in 2000 to 10,2% in 2013). For boys ESL has been declined by about 10% and for girls about 6%. Employment plays a role, by men ESL is at 6% and by women at 1,4% (decreased rates).

Additionally, the category, 'not employed men' on the contrary have increased their early school leaving by almost 4% (from 3,9% to 7,7% (in 8 years)) and by women it has been reduced by more than 1% (from 6,3% to 5,8%) (see Appendix, Section B.1 indicator 6).

Selectivity on tracking and transitions processes

Transition from primary to secondary education is fairly easy; the choice to study at upper secondary education is in the hands of the pupils as well to choose whether they will enrol at a Vocational or at a General Lyceum. Significant selection takes place in the entrance to tertiary education level studies through exams (see explanations in section A.1, sub-section II).

Retention Rates

There is hardly any widely available statistics on the issue of retention. According to the Eurydice report, retention in primary education is in Greece very low in relation to the EU 27 countries; at primary education retention rate is estimated to be below 5%, (in 2007-08), when in France for instance is almost 20% and in Germany more than 15%; at the threshold from pre-school to enrolment to primary education retention is also very low in relation to other EU countries (below 1%); while at the lower secondary education level, (in 2009) Greek pupils have a 4,2% retention rate, when the average in the EU27 countries is 10,4% (Eurydice 2011:35, 54).

The KANEP/GSEE report (2013) includes statistical data from the Ministry of Education that refer to the category pupils that 'passed to the next class'. The data in the report is for the period 2007-2010:

- at primary education, a percentage of 99,4% (unchanged for the period) of all pupils has passed to the next class (p. 22);
- at lower secondary education level, a percentage of 92,2% to 96,4% pupils passed to the next class (increase of 1,3%) (p. 26);
- at upper secondary education (general lyceum), a percentage of 97,6% to 97,9% of all students passed to the next class (an increase of 0,5 in year 2010) (p. 30);
- at upper secondary education (vocational education), a percentage of 95,9% to 94,5% of all pupils passed to the next class (a decrease in 2010 of 0,8%) (p. 36).

It seems that the retention rate is in Greece very low, and this is worthy a further examination that exceeds the scope of this report.

Specific national/political programmes for improving school performance

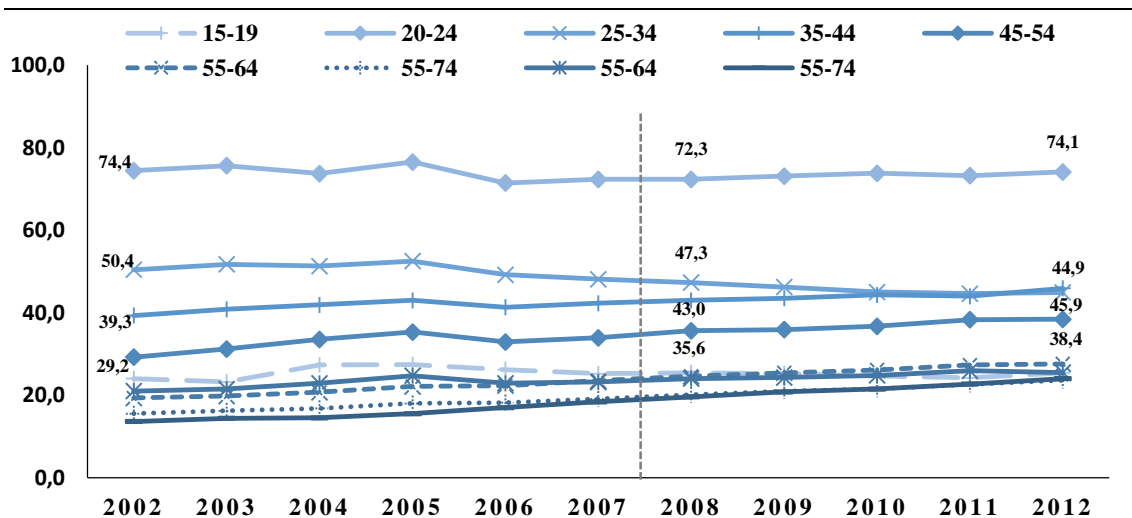
Before 2009, there was an attempt to make teaching more interesting and apart from textbooks that changed in primary and lower secondary education, a new teaching method was introduced, inter-subject or cross subject teaching. The latter I discussed above in section A.2. In addition there were measures that resembled very much the TEIP – Territorialization of Priority Education Policies Intervention. There is no widely available information, apart from the information I have that remedial or compensatory teaching had ceased because of budgetary cuts; the government was thinking of restarting it, according to the concept of solidarity expressed by teachers, when they had

set up a ‘social phrontistirio’ to teach pupils without any fee in order to prepare them for school tests and university entrance exams (see also Kantzara 2014). The plan has not been implemented.

Population with the upper secondary attainment

The population with upper secondary and postsecondary educational attainment has increased by 3,3% (from 34,9% in 2002 to 38,2 in 2012); women have increased their qualification about 4 per cent and men 2 per cent. In the same table the age category 15 to 64 years old is more qualified comprising the 41,1% of the population (in 2012) and it has also increased (it was 38,7% in 2002) (see section B.1, indicator 10, in Appendix).

Figure B1.1 Percentage of total population aged between 15 and 74 with Upper Secondary and Post-Secondary attainment, in Greece (2002-2012)



Source: Eurostat

More specifically, the age category 20-24 has the highest rate of upper secondary education attainment, and women's attainment outperforms men's; the next age category is 25-34. Both have slightly decreased.

Students at ISCED level 3 General education have also increased and comprise the 63,9% of the population in 2011; while students at the same level but in Vocational training comprise 31,7% (in 2011) of the student population. Vocational students have slightly decreased; the majority of students in vocational training are boys (see table, in section B.1, indicator 10 in Appendix).

Population with the tertiary attainment (ISCE 5 A or B)

During the period under discussion the percentage of the population with a tertiary education attainment has increased. In this indicator, Greece has acquired a good position among the EU 27 countries regarding the percentage of the population that attained tertiary education. More particularly: in the age category of 15-74, attainment has increased by almost 8% (from 13,7% in 2002 to 21,2% in 2012).

The age category 25-34 is the most educated among the population (34,2% in 2012); the percentage increased more than 12% from 2002 (22,8%); in this age category, women outperform men (39,8% and 29,0% respectively in 2012) as well as in the next age category 35-44, women's tertiary education attainment is 28,3% and men's is 24,9% (in 2012).

On the contrary the older the generation, the trend is that men outperform women's tertiary education attainment. Exception here is the young generation of 20-24 years old, in which men still outperform women's tertiary educational attainment in 2012 (see tables in section B.1, indicator 11, in Appendix).

Percentage of population aged 25-64 below secondary attainment

When educational attainment in upper secondary and tertiary education has been steadily increasing it follows that the percentage of the population with educational attainment below secondary has been steadily declining: from 2002 to 2012, the respective percentage declined by almost 12% (from 46,2% in 2002 to 34,3% in 2012). Men's attained of below secondary education decreased about 8,5%, while women's 15,3% (2002-2012) (see tables in section B.1, Indicator 12, in Appendix).

Percentage of adults within vocational and educational system

The percentage of adults 25-64 years old studying in the education system has been increasing during 2000 - 2013 by 1,9% (from 1,0% in 2000 to 2,9% in 2013). Exception are in the years 2009 and 2010 the percentage was higher than or equal to 3,0% and started declining in 2010 and decreased further in 2011 (2,4%).

The age category 25-34 seems attempting to increase its educational credentials more than any other age category: their increase is 4,5% (from 2,9% in 2000 to 7,4% in 2013) (the increase is similar to both men and women). The age category of 35 to 44 is the second in participation in the education system: their percentage rose by 1,9% (from 0,4% in 2000 to 2,3% in 2013).

The above trend is very probable also the effect of an educational measure that prompted the so called 'eternity students' (i.e. those that had not completed their studies within the allocated time of 6 or 8 years) to enrol again and take exams in order to complete their studies otherwise they would be thrown out of higher education (in 2012).

Here also I notice that in 2011 the respective percentage of adult participation had declined to resume again in 2012. The same process takes place for the other age categories. The year 2011 was relatively the worst in terms of adult participation in education. Accidentally it was the worst year of economic recession.

Generally, the trend is that the older the generation the less its members participate in the education system (see section B.1, indicator 13, in Appendix).

Adult education at compulsory education level has taken place in 'Schools of Second Chance' as it was mentioned in section A.2, since 1997. At the moment of writing there are 58 such schools all over Greece, but these do not cover all areas of the country and they are situated only in cities. The law 3879/2010 attempts to design an atlas of institutions for adult education throughout Greece and in this direction has set up a General secretariat of life-long learning, showing that it is high on the educational agenda (see also Prokou 2014b). The institute responsible for Schools of Second Chance is to be found at www.inedivim.gr. However the attempts have rather stopped due to budget cuts in education.

In addition, there are no special schools at upper secondary education for adults nor any special entrance university exams (Prokou 2014a).

PISA results (2000 - 2012)

According to PISA (Programme for International Student Achievement) assessment studies, Greek students are found to perform below the average of OECD countries regarding competences in the fields of Mathematics, Reading and science, which are the three fields OECD is doing research on.

More specifically, Greek students are ranked 42 out of the 65 positions on the list of countries participating in the research; the mean score of students in mathematics is 453 (against 613-the highest), in reading 477 (highest: 570) and in science 467 (highest: 580). There is an improvement in mathematics in 2012 of 1,1%, in reading 0,5% and a deterioration in science of -1,1% (see PISA 2014: 5).

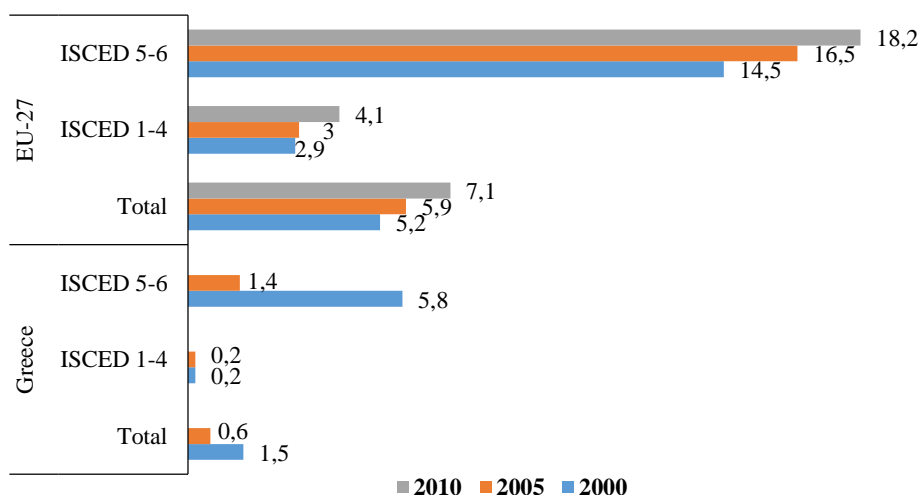
The PISA study evaluates student's competencies at mathematics and literacy. In general, Greek students do not fare well in the measures of PISA as students' performance is below average PISA standards; even more so when from 2000 to 2012 performance decreased and got lower results. It is a dubious matter and it has attracted a lot of criticism. The point is that while because of the crisis one would expect a worsening of school achievement this is the case in the lower levels of PISA ranking of competencies, and it is not the case in the higher rankings. This has been verified from a different source, namely the Panhellenic exams, the entrance exams to the university; the last exam in 2014 showed that candidates improved their grades making access to the university thus more competitive.

In relation to other international comparative research, Greece does not participate in international assessments, such as TIMSS (Trends in International Mathematics and Science) that studies trends in competencies in mathematics and physics at the last year of secondary education, nor at PIRLS (Progress in International Reading Literacy Study) that documents trends in reading comprehension at fourth grade of primary education (more details, see at timmsandpirls.bc.edu).

In short: on the whole, it seems that the education system performs well on tertiary education attainment and retention rates. There is no data concerning delay of studies. On the other hand, adult education covers only compulsory education; there is no information whether the schools for children with disabilities cover the population needing it. Apart from the PISA study, Greece does not participate in other international research that tests learning outcomes. In general, the lack of statistical data on a number of indicators makes it difficult to assess the Greek education system in terms of equity espoused and promoted by the system. From the available information, attention has been

given to access to education and success, though the ‘throughput’, that is, processes of learning within schools seem not to be well documented.

Figure B1.2 - Financial aid to pupils as % of total public expenditure on education, by ISCED level, in Greece and EU-27 (2000-2010)



Source: Eurostat

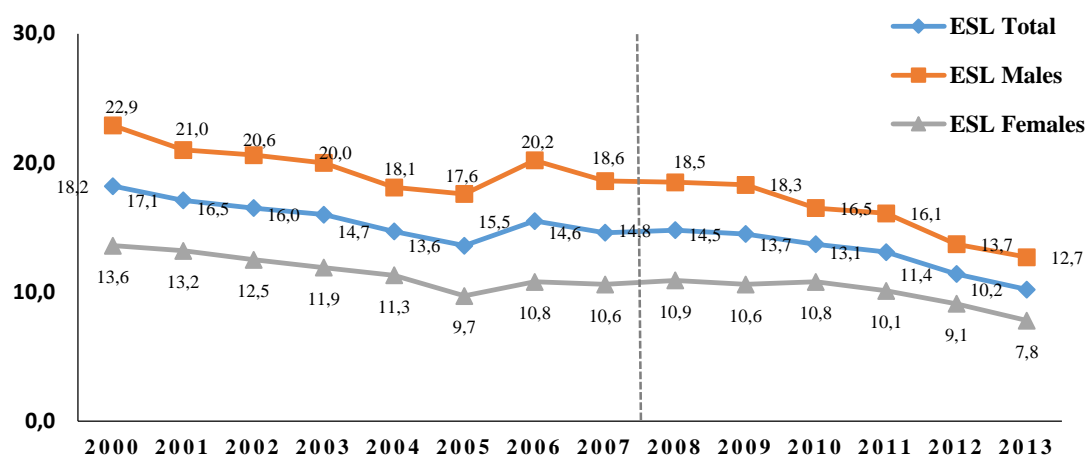
Table B1.1 - Pre-School Enrolment - Pre-primary education (level 0), % in relation to the same age total population and in relation to the same age total population

	% In relation to the same age total population					
	4 years		5 years		6-7 years	
	2000	2012	2000	2012	2000	2012
Total	53,9	54,5	81,7	95,6	53,9	54,5
Males	53,8	53,8	80,9	96,2	53,8	53,8
Females	54,0	55,1	82,6	94,9	54,0	55,1
	% In relation to total students enrolled					
	4 years		5 years		6-7 years	
	2000	2012	2000	2012	2000	2012
Total	:	:	:	:	:	:
Males	50,9	50,7	51,2	67,4	:	67,4
Females	49,1	49,3	48,8	48,6	:	32,6

Source: Eurostat

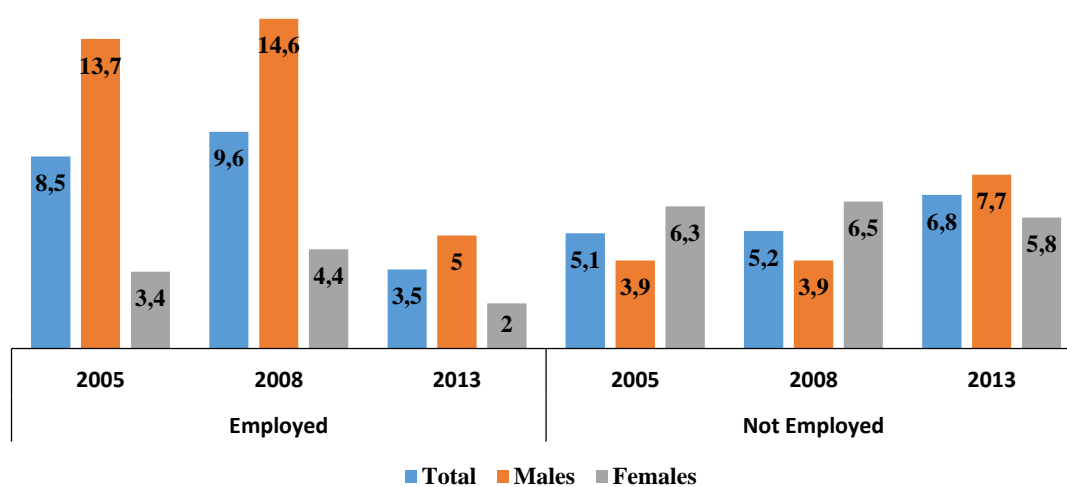
Note: : - data not available

Figure B1.3 - Early School Leaving by sex, in Greece



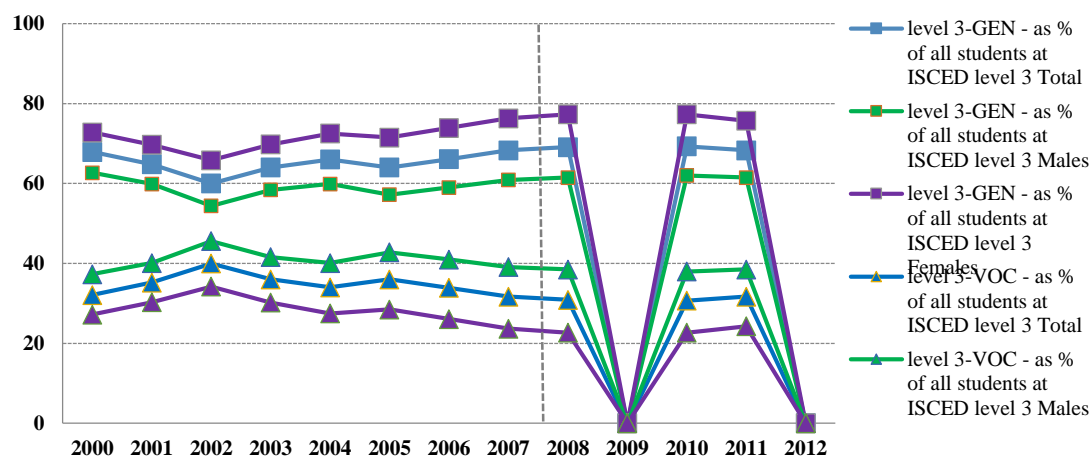
Source: Eurostat

Figure B1.4 - Early School Leaving by labour status, in Greece



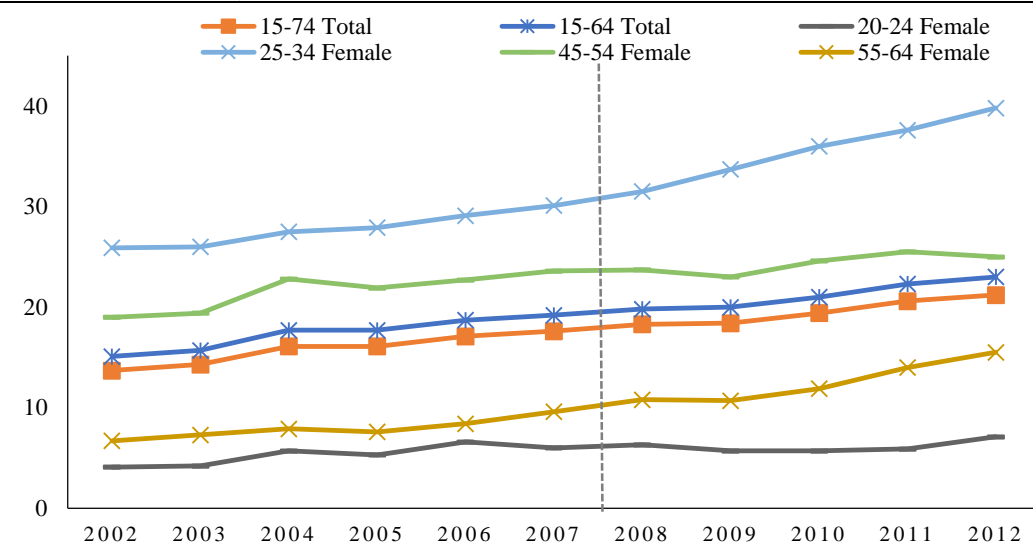
Source: Eurostat

Figure B1.5 - Participation/ Enrolment of students at ISCED level 3-GEN - as % of all students at ISCED level 3, in Greece



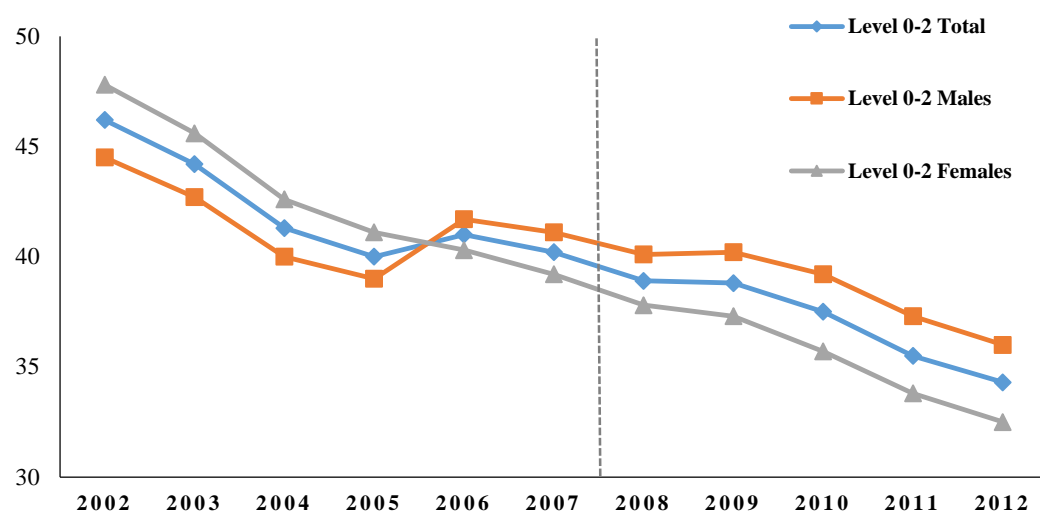
Source: Eurostat

Figure B1.6 - Percentage of total population aged between 15 and 74 with tertiary attainment - Greece, in Greece



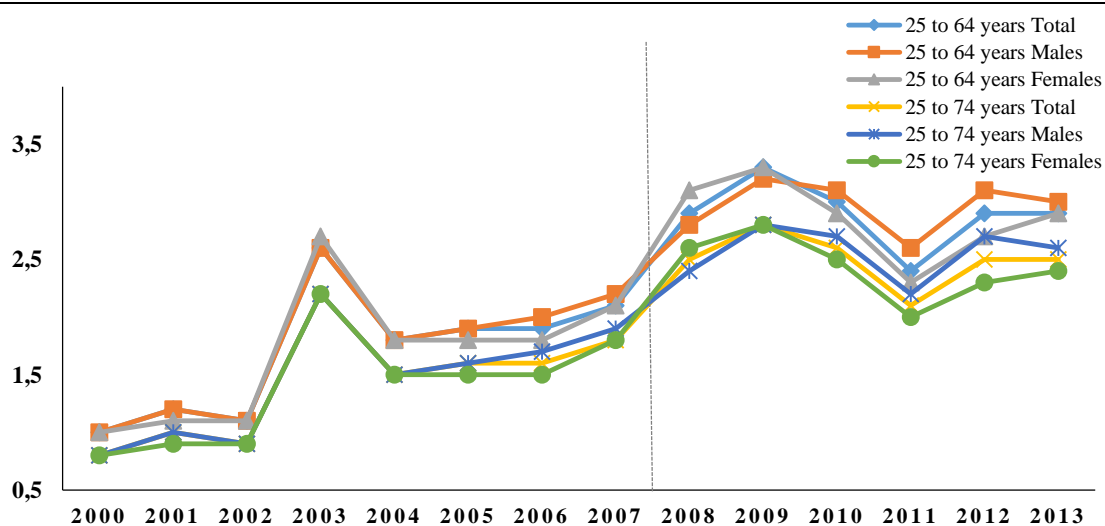
Source: Eurostat

Figure B1.7 - Percentage of population aged 25-64 below secondary attainment, in Greece



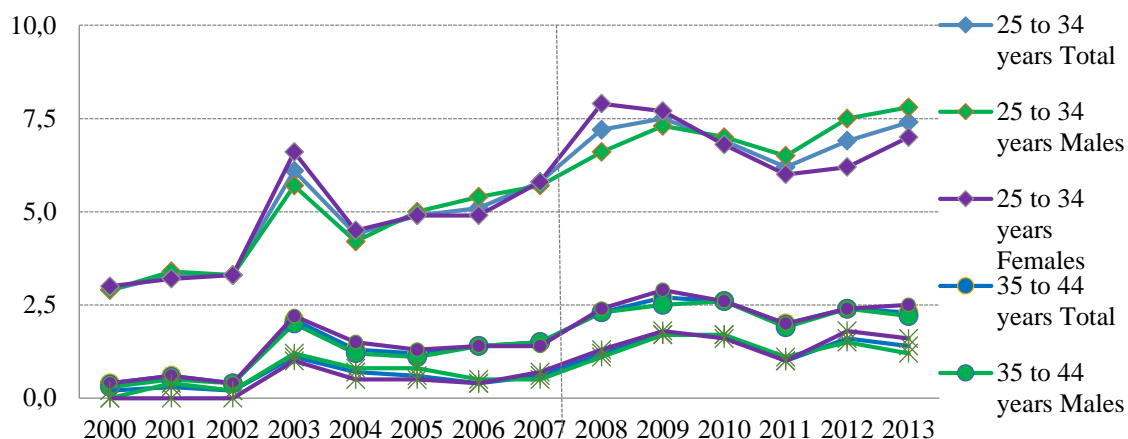
Source: Eurostat

Figure B1.8 - Participation rate in education and training (last 4 weeks), by sex, in Greece



Source: Eurostat

Figure B1.9 - Participation rate in education and training (last 4 weeks) by sex and age (until 54), in Greece



Source: Eurostat

Figure B1.10 - Participation rate in education and training (last 4 weeks) by sex and age (55 or older), in Greece



Source: Eurostat

B2. Final notes on equity, efficiency and quality: orientations and processes

In this final sub-section I shall attempt to provide an account of the Greek education system on the basis of data examined in the previous sections. First follow comments on the ramifications of the crisis and secondly, a number of indicators are examined in terms of equity and quality.

The overall impact of the crisis on education in terms of equity and quality is evident though not so much visible as one would expect. One reason for this is that we need a larger span in years to view the changes in education and those especially attributed to the crisis. The second reason is that one needs statistical data on subjects that are not readily available, for instance changes in the ‘infrastructure’ of education, that is not only buildings and facilities, but retention and delay rates, enhancing access to education for adults, students with disabilities, migrants and various minorities.

The Greek education system seems to have an egalitarian character on two dimensions, access and tuition fees: the first, in terms of access we could argue that tracking is minimal from primary to upper secondary education. The first significant selection is done at the entrance to tertiary education and then to post-graduate studies.

The second dimension refers to tuition fees: studying is free of charge up to post-graduate studies instituted for all levels in 1964. This makes it relatively easy for anyone with good grades to acquire a university degree. However, studying itself is costly, as one needs extra books, help or mentoring, participation in extra-curricular activities outside of school (excursion, visit to museum etc.) that are not free of charge. Studying at the university in another town far from one’s home is costly up to a salary actually (about 700 euro per month). The bulk of the students, those who come from a middle or an upper class background have seemingly no problem to continue their studies.

Students coming from less privileged environments, cultural or economic do not reach higher education in equivalent numbers as their counterparts of other social classes (Sianou- Kyrgiou 2006, see also 2010b). This holds true of descendants of immigrants, minorities, for example the Muslim minority, Roma, migrants, students with disabilities, and adults. Specific data on these students is not readily available, but it is students from these categories who suffer the most from the financial cuts in education that touch infrastructure, compensatory education, but also the inability to study at a ‘phrontistirio’, that is an auxiliary private school prevalent at all levels of education, attendance to which often guarantees school success. There is no available data on how many students

study at these private schools, but experience and some sporadic research shows that more 90% of students who succeed to enter university have attended such a school. With the crisis going the aforementioned percentage is lower, but still shows its significance.

The most evident and direct impact of the crisis on education includes budgetary cuts, and educational reforms.

In regard to budgetary cuts: it denotes reducing public funding on education. Students with disabilities, foreign students and migrants, as well as minority students may find obstacles in their studies: for example transport may be stopped because of funding; schools in poor areas may have no heating in the winter; foreign language text books are not available for free, and compensatory education has also ceased.

A second impact related to budgetary cuts is the diminishing of the education personnel, teachers in primary but mostly in secondary education and the salary cuts these underwent. A third less known impact is that almost no new teachers are appointed at all levels of education; a fourth, again less known effect is that places available for pre-kindergarten education are severely limited; a fourth, the workload on teachers that has enormously been increased. The administrative personnel has been also affected and being limited in education as well as in other institutions in the public sector (see also Kantzara 2014, Prokou 2014a).

A second area of impact refers to educational policy measures and reforms: two waves of reorganising ('shrinking') education took place. One part of measures referred to primary and secondary education and one for tertiary. It included buildings, school units, university departments and personnel, especially in primary but mostly in secondary education, after 2011.

Before the onset of the crisis, the Greek education was characterised by expansion at all levels and in many aspects. After the onset of the crisis education system is being downsized, control and management mechanism alter and this affects the relation of the central government to education. Education is being all the more governed from 'a distance' (Kantzara 2011b).

In general, the Greek education system seems to support equity, but for those students who are equal socially and not for those who are not. The latter categories rely on civil society's organisations and volunteer work in order to have school success during the crisis.

The above mentioned effects of the crisis have implications for the quality of education provided (Kantzara 2011a), which exceeds the focus of the present report,

but which on the long run show the effects on aspects of equity and efficiency.

On the whole, one could argue that aspects of access and success in education seem (still) largely unaffected by the crisis in Greece; though this is probably due to the resilience of the system and its people, whose continuous effort is to keep kids at school and students at universities working and guaranteeing as much as possible the same level of quality in education as before the crisis.

Section A Background

Relatório: _____

Secção A1		
Indicadores	X	Dados nacionais, ou dados facultados, ou ambos / datas/ comentários /página no relatório
Qualification of the population 25-64 years of age		
Employment rate and unemployment rate 25-64		
Gini Coefficient of equivalised disposable income		

At-Risk-of-Poverty rate (cut-off point: 60% of median equalized income after social transfers		
Public expenditure on education % PIB		
Family Expenditure on education % PIB		
Temas		
Levels of social and educational inequality		

Political Cycles – overview on educational policy-making and its evolution		
Main educational policy since the beginning of the crisis and the Troika's intervention		

4. Grids for analysis

Section A Background

Relatório: _____

Seção A2		
Indicadores	X	Dados nacionais ou dados facultados, ou ambos/datas / comentários /página no relatório
Teachers and students numbers (total)		
Numbers of public and private schools		
Vacancies and number of schools -pre-schooling -primary - secondary -tertiary -vocational		
Transitions and tracking in the system -when occurs - Exams? -permeability between cycles – regular/vocational/access to tertiary		
Percentage of students by gender and age groups		

<p>Students by Different educational levels</p> <ul style="list-style-type: none"> - Enrolment rates - Drop-outs - retention 		
<p>Temas</p>		
<p>National educational System</p> <ul style="list-style-type: none"> - educational system diagram - structural characteristics of the educational : compulsory age, autonomy, main actors; themes education of adults and special education (vacancies) 		
<p>Students distribution by available pathways</p> <ul style="list-style-type: none"> -regular -vocational -adults ... 		

Section A Background

Relatório: _____

Seção A3		
Indicadores /temas	X	Dados nacionais ou dados facultados, ou ambos/datas / comentários/página no relatório
Discuss of international tests PIRLS, TIMMs, PISA -influences in policy making		
Educational statistics - regularity - main sources - dissemination - transparency		
Describing the processes of assessments - types – external/internal - regularity - Institutes in charge		
Schools autonomy		

Procedures and recruitment of teachers and their professionalization level		
Teachers training and other educational agents		

Section B Crisis impacts in education

Relatório: _____

Seção B1 - equity		
Indicadores	X	Dados nacionais, ou dados facultados, ou ambos / datas/ comentários/página no relatório
Percentage of students with schooling social support (describing and data)		
Levels of expenditure per student -state -private		
Pre-schooling rates (describing and data)		

Special education and participation rates of children with disability		
Participation rates of students with ethnic background, immigrants, and descendent of immigration		
Selectivity on tracking and transition processes		
Retention rates		
Specific national/political programmes for improving scholar performances - Ex TEIP, National plan reading, ...		
Population with the upper secondary attainment (%)		
Population with the tertiary attainment (ISCE 5 A or B) (%)		

Percentage of population aged 25-64 below secondary attainment		
Percentage of adults within vocational and educational system		
Global evolution of PISA results (focus on equity)		
Temas		
Discussing equity according to national context		
Evolution of policies <ul style="list-style-type: none"> - Access - success 		

B2 – Final notes		
Final balance on most relevant indicators		
Trends and policies		
Evolution of equity and quality		
Crisis and impacts		

5. Interview guide

Dimension	Topics	Questions
Political Contextualization	<ul style="list-style-type: none"> • Education Policy • Political Cycles 	<p>Considering the last decade, how do educational policies been influenced by political cycles? Which were, in your perspective, the main tendencies?</p>
Equity Access Success	<ul style="list-style-type: none"> • Equal opportunities in access and success • Crisis Effects • The role of policy-makers and stakeholders 	<p>Does the current economic and financial crisis impact the equity in the educational system? How? (please, try to lead the discussion in terms of the performance, social inclusion/exclusion and results of the educational system). Which are, in your perspective, the main challenges to be identified?</p>
Quality Orientation Processes	<ul style="list-style-type: none"> • System performance • Guaranty of equity • Evaluation mechanisms • Crisis effects 	<p>Do you consider that the existing mechanisms to evaluate the quality of your country's educational system have been, so far, contributing to the promotion of educational equity? Could you give some examples?</p> <p>And since the current financial and economic crisis, which have been, in your opinion, the main political reactions in terms of educational policies targeting the quality of the system? Could you give some examples?</p>

6. Interviews to experts

6.1- Portugal

Valter Lemos, entrevistado por João Sebastião

Dezembro 2014

Partindo do último governo do Durão Barroso para a frente, como é que nesta última década, as políticas educativas foram influenciadas pelos ciclos políticos entre diferentes forças partidárias, até à actual situação de crise?

E em geral, qual as tendências mais importantes nessa evolução das políticas educativas?

O que me parece mais precoce tem menos que ver com os recursos mais mais com a orientação das finalidades do sistema, dando mais peso à vertente do sistema da preparação para a vida, para o trabalho, da educação enquanto instrumento das políticas económicas e sociais no geral.

Essa transição ocorre entre o Guterres e a entrada no século XXI, que não se inicia com o David Justino mas vai concretizar-se mais com este.

Não tenho ideia que as mudanças de ciclo entre o PS e o PSD tenham orientações muito diferentes neste sentido. Há algumas diferenças na forma de olhar para os problemas em concreto e em encontrar respostas concretas aos problemas. Mas em termos de orientação eu observo uma continuidade da lei de bases, e do engenheiro roberto carneiro, algumas oscilações de ciclo nos anos 90, mas se traçarmos uma regressão há uma continuidade.

Esse privilégio de reorientar mais o sistema do ponto de vista mais utilitário, começa a ter lugar no 2º governo do Guterres, com uma expressão clara e orientação assumida. O Joaquim Azevedo já tinha lançado isso, a questão vem desde essa altura, só que havia uma oscilação constante em função dos ciclos.

Foi a opção tomada pelo engenheiro roberto carneiro e Joaquim de Azevedo (do ensino profissional) construindo paralelamente ao sistema como resposta criativa para o problema que tinham de tentar recuperar a via profissional e vocacional no sistema. Do meu ponto de vista, isso trouxe um desequilíbrio para o sistema. Com a escola pública totalmente licealizada, do ponto de vista das políticas públicas isso criava um problema objectivo muito sensível.

Esse é o ponto de reorientação principal.

Mais tarde veio-se pôr a questão dos recursos com a crise. E o problema da avaliação e da eficácia não é dessa altura, vem desde a influência da OCDE e dos indicadores, com o Education at a Glance (EAG) e o projecto dos indicadores, o INSS??, que vem colocar essa questão no centro das políticas, sendo o PISA já um desenvolvimento disso. A avaliação é das políticas e não dos alunos, apenas para criar um sistema para avaliação de políticas, e é isso que começa a influenciar e a introduzir a avaliação e eficácia nas políticas educativas. E a partir daí passa a ser centrar, quando que se começa a ouvir falar do problema da qualidade, avaliação e excelência, é nos anos 90, introduzindo-se essa orientação.

Em Portugal, como historicamente já tinha acontecido em termos de retórica prévia. Em Portugal temos uma construção formalizada e retórica antecedente sempre à sua implementação, havendo sempre um gap entre um momento e o outro em termos de políticas em Portugal.

Declarações de princípios políticos sem instituir regras e normas, dada a construção muito retórica do sistema, e fez com que às vezes tivéssemos feito saltos entre a construção da política e a sua implementação não haja continuidade e saltos (temporais). E por vezes passamos por algumas coisas sem elas terem consequência na legislação escolar.

Por exemplo, a implementação das vias profissionais na escola pública é feita sem normativos. A formulação já estava feita e a sua implementação é que não estava. A metodologia é muito diferente em relação à construção e implementação da política nos países anglo-saxónicos.

Essa retórica, revela uma relativa continuidade entre os governos, mas essa dificuldade surge porque há acordo entre as elites políticas mas não existe consenso social, por tradição política?

No estudo que fiz verifiquei uma coisa interessante: nos indicadores de macro política Portugal apresentava uma convergência com as médias da OCDE, mas no que respeita na implementação das políticas, mais o caso das micro políticas, isso não se verifica. Outros autores mostram coisas idênticas para outros países, o caso não é exclusivamente português.

Ou seja, a relação entre os resultados globais e os meios não me parece tão bem estabelecida assim. Porque nas micro políticas, o peso dos stakeholders é muito maior, dos diversos parceiros e grupos activos, o que torna muito mais difícil uma continuidade, o que não se projecta nas orientações globais.

Uma grande continuidade, portanto, de macro políticas, mas uma grande oscilação de micro políticas, de mudanças muito significativas, revelando uma progressão completamente diferente em termos de ciclos.

No caso português conseguimos essa convergência mas na base numa grande selectividade social.

No caso português, não sendo exclusivo, é notório. Inclusivamente países do norte da Europa, onde a convergência das micro políticas não se verifica.

A partir dos anos 80 nas políticas globais, a longo prazo, é possível traçar uma recta de regressão em Portugal, ao nível das macro políticas. Agora é que está a acontecer um momento de ruptura nas políticas globais.

De ruptura ou de reorientação?

Das duas coisas? Eu do meu ponto de vista ainda não sou capaz de dizer que é uma ruptura ou reorientação. Lá estamos com o mesmo problema. Há uma retórica de reorientação, mas isso não se traduz dessa forma na implementação, torna-se ruptura.

Mas só é possível perceber se essa ruptura se consolida ou não, ou efeito colateral da crise se manifesta, mas precisamos de tempo.

Ao nível do discurso há uma clara ruptura e das finalidades e políticas de implementação, e da macropolítica, que nada tem haver com os 30 anos em que não houve uma ruptura discursiva.

Essa ruptura tem um sentido mais elitista?

Já agora deixa-me só dizer uma coisa em relação aos actores. O Roberto Carneiro, por exemplo, é um actor que está presente em todos os ciclos e da mesma forma...

O chamado actor longitudinal...

(risos) sim!

Porque é mais simbólico, está mais presente e sempre presente, sempre com o mesmo estatuto, nos diversos ciclos de política, e com o mesmo acordo dos parceiros.

A CRISE financeira, e eventual ruptura de discurso e eventual reorientação do sistema tem tido impacto na equidade, ou a equidade manteve-se?

Com o início da crise, a equidade melhorou, estávamos num processo de aceleração, de crescimento dos indicadores de equidade. E isso continuou mesmo já durante a crise.

Esse gap, as consequências não se projectam imediatamente no sistema, há uma inércia no sistema, no caso português também devido às orientações políticas em cada governo.

A inversão dessa tendência poderia ter acontecido mais cedo se realmente não tivesse havido uma orientação política no primeiro governo de Sócrates muito centrada nas questões do sucesso educativo, com muita consequência nas questões de equidade, o que levou que essa inércia, que esse período se prolongasse mais tempo do que seria de esperar.

Creio que noutros países as alterações das condições de equidade começou mais cedo.

Na Itália começou 10 anos mais cedo...

Em Portugal foi projectada para mais tarde, e do ciclo político ser nessa perspectiva de inércia.

Nos jornais da época do governo de Sócrates, na comunicação social, tão depressa se encontram documentos fortemente centrados na melhoria do sistema de ensino, sucesso, qualidade, equidade e desigualdade, como se encontram artigos centrados nos mesmos dados e falando a questão da eficiência e avaliação com discursos contraditórios.

E hoje vê-se o mesmo contraditório na comunicação social.

Como é que medidas, todas diferentes umas das outras, são associadas ou não à crise?

Há uma série de medidas que não são associáveis à crise. O trajecto da avaliação e das questões da eficiência, começou antes da crise, no princípio dos anos 1990, quando do ponto de vista internacional estávamos numa fase de crescimento.

A questão é anterior à crise, e tem muito que haver com a intervenção da OCDE e o projecto de criação de indicadores entre os países, que foi muito discutido e demorou alguns anos. O education at a glance, foi muito constextada por alguns países, e depois do acordo global, a orientação foi outra, e a crise sobreveio a essa questão.

Mas a crise vem acentuar essas tendências.

Portugal e NEE – a crise já estava presente, a situação das crianças com NEE estava muito distante da integração antes do meu governo, e nesse sentido essas medidas foram anti-cíclicas. Estávamos manifestamente com problemas de recursos – onde a retórica estava mais à frente, dos mais diversos quadrantes. Havia objectivamente na mesma um problema de recursos, e tivemos uma política anti-cíclica.

Simultaneamente aumentássemos a eficiência em relação aos professores, relação professor-aluno, nº horas de professores, e políticas de aumento de equidade. NEE dependia objectivamente de recursos .

Hoje uma grandissima alteração, mesmo se não assumida em termos de discurso político, e ao contrário dos exames nacionais. A crise criou condições favoráveis a essa opção, mas não é uma consequência da crise, fica escudada através da crise.

Os exames, a igualdade do sucesso- uma medida simbólica ex os alunos com NEE têm de fazer os mesmos exames, e nas mesmas condições, mas é uma orientação política muito clara, menos preocupada com equidade e mais com outras questões.

Nos exames – vem do projecto dos indicadores, uma pressão para ter comparáveis, no princípio da comparabilidade.

Tiveram impacto em termos de gestão na qualidade do ensino?

Sim, nos mecanismos de sistema de qualidade.

No caso dos exames, não é avaliação externa que coloca problemas à equidade. É a utilização desses mecanismos, no que diz respeito quer aos percursos escolares dos alunos, quer à eventual gestão dos actores, escolas, etc...quanto mais precoces forem esses mecanismos, mais cedo afectam os percursos escolares dos alunos e criam condições de desigualdade, logo mais cedo criam maiores problemas na gestão da equidade.

Vamos separar duas coisas – no contexto de existência externas nas aprendizagens das competências dos alunos. As avaliações externas podem ter duas funções essenciais: 1) informação retroactiva, quer para as políticas, quer para a gestão do processo pedagógico, 2) certificação social.

Outras avaliações externas não tendo função de certificação social, não têm nenhum tipo de problemas de equidade, e até podem ser instrumentos úteis na gestão da equidade e suas condições: nomeadamente instrumentos úteis quer no que respeita políticas aos contextos escolares e sua diferença (ex TEIPs) quer em relação ao percurso escolar dos alunos.

Mas se dermos predomínio da avaliação externa no impacto social da certificação, aí a questão é completamente diferente, porque a informação deixa de ser interna ao sistema e deixa de ser recuperável. Ou seja, o resultado dos exames – é por isso que a prova de aferições eram para um leigo um exame, não eram objectivamente classificáveis imperceptíveis para o comum do cidadão propositadamente – para manter a informação dentro do sistema e retirar-lhe a função de certificação social – não são instrumentos que coloquem problemas de equidade, pelo contrário, são instrumentos úteis para a desenvolver.

Os exames, não certificam do ponto de vista da aprendizagem nem são comparáveis dum ano para o outro, enquanto as provas de aferição sim e em termos de competências. Já os exames são provas de domínio, que se vê, de forma aleatória, qual é o conhecimento global que os alunos têm daquela matéria. E não é recuperável, não tem retroactividade para recuperar os alunos.

Desse ponto de vista, podem ser vistos como mecanismos de qualidade, os exames?

Não, acho que são mecanismos de confiança social e não de qualidade. Já a avaliação externa são mecanismos de qualidade. A introdução de mais exames tem efeito contrário, porque afecta a qualidade, porque produz resultados que são irreversíveis e não se pode agir sobre as condições que produziram esses resultados, servem apenas para transmitir confiança social, são apenas de certificação social.

Provavelmente a confiança social melhora ou aumenta, não sei, mas à custa das condições de qualidade e de equidade. Porque a partir do momento em que não é possível utilizar aquela informação para desenvolver condições de equidade e qualidade, os exames transformam-se num facto impossível de

converter, transformar. Ficamos imediatamente condicionados ao desenho das políticas para esse efeito, mas também das acções pedagógicas dos professores – políticas mais micro e macro condicionados.

Genericamente, as políticas relacionadas com a melhoria da avaliação e da eficiência implicam uma acção sobre os recursos, condicionante da utilização dos recursos. Mas nem sempre isso resulta numa melhor e mais eficiente utilização dos recursos, e também em termos de resultados. Se não perdermos a possibilidade de agir sobre a informação que temos – não temos possibilidade nenhuma e os exames são assim. Depois já não temos instrumentos. E a história mostra-nos o contrário – agir sobre as condições dos alunos, mas os rankings têm impactos enormes sobre as políticas do ponto de vista dos contextos – reduz o seu efeito.

A alteração radical do discurso actual tem que ver com isso. Não tem haver com recursos e crise, mas ideológica, e não com a crise, bem pelo contrário. É menos eficiente do ponto de vista dos recursos – é uma orientação bem diferente, e tem haver com o entendimento com e equidade e a transformação das condições de equidade.

As políticas relacionadas com a equidade podem ser orientadas ou para o acesso ou para o sucesso. As políticas actuais de equidade revelam uma orientação para os resultados. Se no caso da Maria Lurdes Rodrigues era no sentido de obter resultados que criem melhores condições para a equidade, no acesso e continuidade do processo educativo, do ponto de vista dos resultados de todos os alunos globais, e não apenas de alguns alunos.

No fundo é uma questão de garantia da qualidade das aprendizagens?

Sim, apesar de termos estado em contra-ciclo pelo atraso histórico em comparação com outros países.

Na formação de professores, ou apoio educativos aos alunos, ou outros mecanismos mais estruturais como os TEIPs, temos mecanismos eficientes hoje?

Aí acho que há um processo de regressão. No que respeita mas que vem dantes, desde o princípio da crise e na mudança de ciclo político. Não sei se é reorientação ou ruptura – todos esses mecanismos, sejam compensatórios ou reforço, a maioria disso está tudo em regressão. E a partir dos exames não é possível intervir nesse sentido. Estamos num processo de retrocesso muito acentuado, que não é mais acentuado por razões dos efeitos deste ciclo.

Na avaliação dos professores já não é assim.

Até que ponto é que os compromissos internacionais, como agenda 2020, OCDE, até que ponto servem de almofada de protecção para estas rupturas?

Servem e muito. A influência da OCDE é um softpower, e a UE ainda mais hardpower, a sua influência é objectivamente condicionante e em ambos os sentidos.

No caso de Portugal, as melhorias de condições de equidade no acesso têm uma grande influência da pressão da OCDE apesar das enormes resistências internas, tal como os projectos dos indicadores no sentido da avaliação e eficiência.

Claro que isso significa que a orientação política global, e a OCDE é muito plural, mas na UE menos. OCDE tem orientações menos claras e por vezes contraditórias dentro da própria OCDE, nos seus documentos, de um ano para o outro. Os actores não são exclusivamente os políticos e os governos, mas peritos, há um fundamento nas orientações e nos ciclos mais aberto, não sendo um hardpower tem condições para isso, nesse sentido tem uma diferença do que é a construção das políticas europeias.

Mas tem influência quer no sentido prospectivo quer de retroacção sobre o que se está a passar no concreto.

O que as pessoas conhecem melhor, e mais rapidamente tiramos dos documentos da OCDE é sobre as micro políticas, mas não tem uma correspondência directa. Desde que o projecto dos indicadores se estabeleceu há uma maior pressão, mas mesmo aí não há uma situação de clara convergência.

Depois há a dimensão da construção das políticas localmente, e das lutas dos actores e das instituições.

No ME em 2005, no ano seguinte descobri que tinha que recolocar professores da telescola ou directores de escolas que já tinham fechado anos antes, e estamos a falar de pessoas que estavam no desempenho daquelas funções, de pessoas em concreto, resíduos de políticas anteriores. Mais um exemplo de inércia e desencontro entre macro e micro políticas.

Se fosse analisar hoje apenas o discursos político, eu diria que estamos numa clara ruptura, ou a analisar o que se passa concretamente nas escolas, não é bem o caso, porque ainda se vê o efeito das políticas anteriores.

A representação que os professores criam vem das orientações e das políticas, na forma como eles organizam o seu trabalho, e se as políticas vão ter sucesso ou não.

Em Portugal, os professores pela primeira vez na história estão a passar por um período em que as questões orientadoras do seu percursos profissional desapareceram todas. A geração de professores que temos actualmente ao serviço constituíram e organizaram a sua vida e atitude profissional em função dos princípios orientadores a política educativa que tem haver com a vida profissional, e isso agora não existe nada, a própria carreira de professor está suspensa, e referenciava-se muito pela existência de carreira.

Qual a razão que a crise tem aqui, como é que a crise intervém aí?

Os seus efeitos nas pessoas tem impacto na produção de políticas, e não está muito claro e pouco aprofundado.

Tendo agora regressar à actividade, coloco-me do ponto de vista da observação duma maneira diferente quando tinha antes. Há sempre a tendência para olhar para os professores como recursos como recursos e não como actores, e são definitivamente actores.

Formação dos professores, poderia falar um pouco mais?

Neste período houve uma reorientação clara da política da formação de professores. Eu não tenho certeza se é influência crise ou da filosofia dos indicadores e programa de indicadores, e aquilo que é a filosofia do próprio sistema.

Essa orientação está alinhada com uma certa desprofissionalização, quando a continuidade anterior e de força da construção do sistema de educação moderna passava pela profissionalização dos professores. Por isso o sindicato dos professores tem uma força importante, pelo processo intenso de profissionalização dos professores.

Agora, num tempo de claramente num ciclo de desprofissionalização – a minha dúvida se isto é um resultado de crise, porque afecta a gestão dos recursos e eles são os principais recursos do sistema – ou se é uma transformação da orientação política e social do papel da escola na sociedade.

Nós introduzimos alteração significativa no sistema de formação inicial dos professores, hoje tenho sérias dúvidas sobre o efeito, os resultados daquilo e sobre a orientação subjacente aquela decisão, à construção daquela política – e trabalhei muito para ela.

Para já, os resultados são concordantes com o processo de desprofissionalização, que eu na altura não equacionei daquela forma, e agora parece-me inequívoco.

Por exemplo, o ter passado a formação inicial para dois ciclos, estou arrependidíssimo, cria um processo de desprofissionalização.

Cria uma ruptura entre os dois ciclos. E quem faz o primeiro ciclo não ganha nenhum espírito profissional, e a sua ligação à profissão e área científica é fraca.

E o segundo ciclo é insuficiente para isso. Há claramente uma alteração muito significativa para essa situação. As instituições estão a reverter para um sistema de base empiricista e mais profissionalizado, de estágios profissionais. O sistema português, uma das suas linhas de força e central era efectivamente a profissionalização dos professores, não só apenas terem sentido de orientação de carreira, da formação orientada, de formação contínua concebido por um sistema de profissionalizado, e foi uma linha de força do sistema.

O que se passa noutras áreas profissionais, expressa-se também noutras áreas no sentido mais utilitarista das pessoas pelas instituições.

AS actividades profissionalizadas são mais caras e o custo do trabalho unitário do trabalho também é mais caro, mesmo sendo mais eficiente.

E a crise tem o impacto que tende a reduzir os custos unitários do trabalho, logo a reduzir a profissionalização do trabalho, e o impacto aí não é só dos professores, mas do mercado de trabalho no geral.

Não sei se a razão é só essa ou não.

Pode ser essa a razão ou numa discussão mais alargada dos processos de globalização.

Mas as discussões sobre o problema de mandar embora professores altamente experientes para contratar professores inexperientes, faz parte dessa discussão e vem de antes da crise.

E isso traz algumas incongruências do tempo moderno, que é o crescimento dos níveis de qualificação simultâneo ao descréscimo dos níveis de desprofissionalização.

Há países em que a profissionalização nunca chegou a acontecer, e esteve sempre mais condicionada às leis do mercado. Nesse caso, Portugal tem um estatuto de carreira de professores que não existe onde a contratação destes acontece no mercado, e não há carreiras. Na Europa liberal por exemplo, não é como em Portugal, e aqui estamos mais preso nesse sistema.

Muitos dos problemas que existem com contratações dos professores tem haver com a essa carreira e profissionalização da actividade, o que leva a características próprias de alojamento e recrutamento.

O facto de ser centralizado, apenas coloca problemas adicionais, mas a raiz da questão não está na centralização. E aqui a desprofissionalização vai ter impacto muito grande no funcionamento das escolas, e nas políticas a definir no sector.

Anteriormente poderia olhar-se como instrumento de políticas, acho que vai ser condicionador, forte condicionador das políticas educativas a seguir. Não é possível contar com as características organizacionais para o recrutamento que se quer. As representações que os professores depois fazem das políticas é determinante na forma como elas se implementam e dos resultados.

ao CONTRÁRIO da ideia de grande centralização do sistema de educação e que os professores têm pouca autonomia não é verdade, em Portugal têm níveis de autonomia elevadíssimos, são actores fundamentais e nem pensar em negligenciar esse ponto de vista. Muito mais que os níveis de autonomia das escolas. E em Portugal as escolas são pouco autónomas mas os professores são muito autónomas. Os professores acabam por ter mais importância que as escolas na implementação das políticas.

O conjunto dos professores, no sentido de somatório de cada um e não enquanto entidade organizada (sindicatos) têm um papel muito importante, pela cultura profissional dos professores que não está suficientemente estudada. Ouvir só os que os professores dizem é muito interessante, com peso muito grande no impacto sobre implementação de políticas.

A identificação dos professores com a escola.

6.2- Italy

INTERVISTA – VITTORIO CAMPIONE (Maddalena Colombo)

Vittorio Campione di Astrid Roma, introduciamo spiegando come mai hai maturato una vicinanza all’analisi e ai processi deliberativi nell’ambito dell’*education* in Italia.

Aldilà dei pregressi biografici, che hanno importanza relativa, nel senso che mi sono occupato di scuola e di politiche educative da molto presto, ho avuto l’occasione di ricoprire dei ruoli visibili e di responsabilità, sia nel periodo universitario sia in quello successivo alla laurea, ad esempio, in un tempo assai lontano nel 1970, abbiamo fondato il Sindacato Confederale degli Insegnanti, fino a quegli anni lì, il sindacalismo nei confronti della scuola era soltanto “sindacalismo autonomo” , lo dico solo a titolo di esempio, poi i percorsi sono stati altri, con impegno più nella azione politica che in quella sindacale o di settore. L’incrocio fondamentale è quello della metà degli anni novanta, quando, nel momento in cui si costituisce nella breccia della legislatura un governo, Prodi e successivi, che hanno dell’azione sulle tematiche educative uno dei punti fermi del loro programma, assieme al ministro dell’istruzione, il ministro Berlinguer, mi chiama a collaborare con lui, da allora, per oltre 15 anni quasi, questo è stato uno dei principali ambiti di azione miei, nell’azione di governo finché c’è stata, oppure non nell’azione di governo, continuando però a lavorare, riflettere e studiare su questi temi. Che poi questo fa di me un esperto particolarmente longevo non lo so, dal punto di vista biografico forse, però sicuramente mi dà l’opportunità, e forse questo è uno dei motivi di interesse per voi, di (avere) una visione che è assieme ad ampio spettro dal punto di vista temporale e per le azioni compiute anche tale da avermi messo nelle condizioni di scavare un po’ dentro i temi.

In questo che hai partecipato come consulente/consigliere, soprattutto alle politiche di centro-sinistra.

Assolutamente sì, questa è la mia collocazione ed è l’ambito a mio giudizio che ha più nelle sue corde l’azione di innovazione e di trasformazione dei percorsi educativi; aldilà di certi slogan che di volta in volta, nel succedersi campagne elettorali, le diverse forze politiche hanno messo in campo, sicuramente se c’è

un confine che può essere tracciato, fra chi è impegnato sul terreno dell'innovazione educativa, guardando all'obiettivo di una "piena formazione della persona", perché l'articolo 3 della nostra Costituzione a questo guarda, molto spesso quando si parla del rapporto tra scuola e Costituzione in tanti guardano agli articoli 33 e 34, io invito sempre a guardare con attenzione l'articolo 3, il ragionamento sui diritti e sulla realizzazione della persona, la rimozione degli ostacoli per il pieno ottenimento di questi diritti, questa è la base su cui il percorso educativo deve reggersi, ed è quella a cui si è guardato per esempio nell'azione politica della 13esima legislatura, e credo, negli ultimi 4-5 anni, con grande attenzione da parte dei ministri che si sono succeduti. Poi che questo possa aver portato a risultati compiuti oppure no è oggetto di un altro tipo di analisi...

Stiamo entrando nel vivo del periodo che ci interessa e che si circoscrive agli ultimi 10 anni, quindi in come siamo entrati nel ciclo di crisi e come lo abbiamo affrontato restandoci all'interno, mi sembra di poter individuare un'alternanza di governi in questi 10 anni, può apparire curioso, abbiamo cambiato 5 governi e 4 intese politiche, con cambio di ministri della pubblica istruzione; in che misura le politiche educative hanno risentito di queste alternanze politiche?

Naturalmente sarebbe impossibile prescindere da quelle che sono state le maggioranze politiche che hanno retto il paese nell'arco di questi 10 anni, nella valutazione delle questioni che lei mi sta ponendo; però mi permetto di mettere un punto interrogativo nell'argomento, poi entrerò nel merito, che è questo: non sono sicurissimo che il comportamento delle forze meno disponibili all'innovazione, corrisponda, in tutto, o anche una parte prevalente, o meglio "derivati", dall'orientamento politico/culturale di questi soggetti, in altri termini la destra è conservatrice e la sinistra innovatrice, quindi le proposte di innovazione vengono da sinistra e di conservazione da destra, probabilmente dal punto di vista dell'agire politico può essere considerato corrispondente al vero, salvo verifica caso per caso, ma se andiamo a vedere nel corpo profondo di chi opera nel sistema educativo e di chi guarda il sistema educativo come utente o soltanto come osservatore, non sono sicuro ci sia questa corrispondenza. Qualche volta scrivendo mi è capitato di usare l'espressione del conservatorismo di sinistra, non mi è capitato quasi mai di usare il termine "innovazioneismo" per il centro-destra, però certamente il conservatorismo di sinistra esiste ed è una cosa che si basa fondamentalmente su una percezione che è radicata nel nostro Paese, è la percezione secondo la quale, con tutti i suoi guasti, con tutti i suoi limiti, le sue debolezze e i suoi problemi, il sistema educativo uscito dal 1923 dalla mente di Giovanni Gentile, sostanzialmente è quello giusto che funziona male, che è detto male, è quello giusto nel quale ci sono delle cose che non funzionano, però fondamentalmente quando si dice questo si guarda più alla funzione socialmente iniqua che certi passaggi e certi contenuti del sistema Gentiliano hanno, non si guarda alla cosa più profonda che è la totale inadeguatezza, uso il termine non nell'enfasi del discorso ma in maniera meditata, di quel sistema, a realizzare gli obiettivi che al sistema educativo italiano sono stati dati dalla Costituzione; non rimuove gli ostacoli, cioè non mette i giovani nelle condizioni di conoscere la realtà che li circonda. Un sistema nel quale ancora oggi, 2015 tra qualche settimana, è possibile ascoltare espressioni del tipo: "studia altrimenti ti mando a lavorare" pronunciate da padri e madri affettuosi, insegnanti, persone in totale buona fede, significa non capire che il percorso studio/lavoro, è un percorso che si intreccia continuamente, per tutti

e ad ogni grado dell'istruzione, non mandare a lavorare i bambini, ovviamente no, però appunto la cultura del lavoro come elemento di emancipazione e di crescita dei soggetti, a discapito della scuola.

Si possono individuare delle misure o delle direzioni politiche di governo del sistema che riflettono più direttamente un liberismo più sfrenato da parte dei governi o riforme di centro-destra, e uno statalismo più marcato o più riconoscibile?

Tra i governi di centro-destra che si sono succeduti, anche se sarebbe più corretto parlare dei singoli ministri, abbiamo due elementi di grande differenza a mio avviso, e uso due pezzi comparanti tra ministero Moratti e ministero Gelmini: il ministero Moratti, è un ministero nel quale sicuramente elementi di una cultura liberal-conservatrice sono presenti in modo diffuso, aldilà dei discorsi delle "tre i" che il presidente Berlusconi aveva portato in campagna elettorale, quello è un ministero nella quale si guarda con molta precisione due cose, uno è smontare gli elementi che più avevano rappresentato innovazione nell'ordinamento scolastico nella legislatura precedente, tranne che sull'autonomia per cui era difficile intervenire poiché era entrata in Costituzione, sul resto, cioè ordinamento dei cicli, e comunque, complessivamente, l'insieme delle azioni che erano state poste in essere dal ministero Berlinguer, che precede, questo è un pezzo dell'azione del governo della destra, cioè disinnescare degli elementi che, messi a regime, avrebbero potuto portare a risultati diversi; l'altro elemento è di attenzione ad un percorso che prova a essere legato a obiettivi e strategie, che il mondo imprenditoriale, allora organizzato in un certo modo, portava avanti. L'attenzione verso gli istituti tecnici e gli istituti professionali, che sostanzialmente portava ad aprire a sollecitazioni che venivano dal mondo imprenditoriale, cosa in sé sicuramente interessante, ma non dentro una strategia generale di rapporto scuola/lavoro, come quella che possiamo intravedere nelle cose dell'attuale governo, dove all'interno del documento sulla buona scuola, intendo cose molto diverse che magari vedremo più avanti, però sicuramente questo ragionamento dell'alternanza scuola/lavoro e dello spazio a questi elementi che viene dato, sono un elemento simile all'innovazione; di Moratti l'istruzione non cambia sostanzialmente, il lavoro non cambia sostanzialmente, il rapporto scuola/lavoro è un rapporto programmato, ma non innestato su concrete azioni.

In compenso c'è il richiamo al merito e alla selezione?

L'elemento legato al merito e alla selezione, in Moratti c'è meno che non nella situazione successiva con Gelmini; Gelmini è una cosa diversa, è un governo che ormai ha messo da parte ogni ipotesi di innovazione, seppur abbia avuto il centro-destra, i sogni sono tramontanti e chi li portava avanti non è più di quella partita lì; è un ministero totalmente subalterno alle scelte di politica finanziaria del governo, quando si dice che il ministro dell'istruzione in quel periodo è stato fondamentalmente quello che risiedeva in via 20 Settembre, e non quello che risiedeva in viale Trastevere, si dice una cosa ben chiara e giusta da questo punto di vista. Naturalmente accanto ai disastri generali che quel governo, Berlusconi, della 25esima legislatura, ha portato al Paese, portandoci poi al 2011, noi arriviamo sostanzialmente sull'orlo del default economico/finanziario, nel caso specifico ha sottratto risorse alla scuola, l'Università, le ricerche; ha sottratto iniziative e impoverito l'azione di Governo nell'ambito della scuola, ha impoverito la struttura dell'amministrazione, che è giunta a livelli molto vicini

all'impossibilità, parliamo di ministero e l'amministrazione nel suo complesso, è evidente che se non si investe sulla formazione dei dirigenti, sulla loro crescita...

Tutto ciò allora è liberismo? Tutto ciò, parlando dell'ultima fase, è scarsa capacità di governare, e per altro verso è veder sopraffatte le linee e qualche interesse che potevano esserci nel programma del ministero Moratti, da una parte dall'irascismo esasperato della legislatura precedente, e dall'altra tutto sommato da una non piena capacità di avere una visione generale.

Piuttosto nessun obiettivo specifico, ma subalternità riguardo gli obiettivi...

Sì, subalternità riguardo agli obiettivi di politica economico/finanziaria, e a quel punto quando non hai una linea, sei soggetto a mille strattoni, questo poi è stato.

Veniamo alla breve parentesi di Prodi, di Fioroni...

Il ministero Prodi 2006/2008, forse anche per le caratteristiche del Ministro, adesso non vorrei dedicare più tempo a questa questione, però sicuramente per l'instabilità complessiva di questo governo, sostanzialmente non ha lasciato tracce visibili, se non...

L'obbligo in finanziaria?

A parte l'obbligo in finanziaria, che è sicuramente una cosa importante, ma posso dire che è più frutto delle cose precedenti, compresa Moratti; la cosa interessante è il tentativo di metter mano agli "indirizzi", quelli che quando andavo a scuola io si chiamavano "programmi", le "indicazioni Nazionali", che sono frutto di un lavoro culturalmente apprezzabile di chi ci ha lavorato, e che ha lasciato e sta lasciando qualche spazio.

Si deve a Fioroni?

Si deve questo processo alle persone, da Scelunzi, a Berlinguer che ci lavorò e ad altri, senza stare a fare l'elenco dei nomi, è stato un grande lavoro, si deve ad alcuni dirigenti che adesso hanno lasciato l'amministrazione per motivi di età ed hanno rappresentato un punto di riferimento importante per l'istruzione di quel periodo.

Quindi, veniamo ai governi di Unità Nazionale, chiamiamoli così da Monti in poi, se possiamo chiamarli non governi di centro-sinistra puri (Monti, Letta, Renzi).

Monti, Letta e Renzi, che però sono tre cose diverse, hanno avuto tre ministri diversi ma non solo per questo, anche come maggioranza di riferimento. Io non uso volentieri il termine Unità Nazionale, perché presuppone che ci sia un' "Unità", non mi sembra che le vicende e il dibattito interno con le compagini

governative siano queste, il governo Monti ha una maggioranza gigantesca, però è anche un governo nel quale non c'è in nessun luogo la possibilità di parlare di Unità Nazionale, e nel caso di Letta e poi Renzi, il quadro politico è un'altra cosa rispetto all'Unità Nazionale.

Torniamo al tema: come hanno influenzato le politiche del dopo 2011, quindi del dopo-crisi?

Il governo Monti, e quindi il ministero Profumo, che poi è l'ultimo con cui ho collaborato, lo dico con questo minimo di condizione, è un governo che ha la legittima ambizione di riprendere il percorso riformatore delle legislature precedenti, c'è anche un collegamento abbastanza esplicito nell'approccio programmatico, si riprendono temi che erano passati in sottofondo, sotto traccia negli anni successivi, uno è per esempio quello della durata del corso degli studi, però anche più in generale il rapporto tra istruzione tecnico professionale da una parte e istruzione liceale dall'altra, e cose di questo genere. Il problema di quel governo è da una parte l'assoluta insufficienza delle risorse, perché la crisi morde, morde fortemente...

Risorse, la crisi è nel dopo 2008, qua siamo già nel 2011 e le risorse son state tagliate ben prima...

Le risorse sono state tagliate ben prima e non si riesce a rimetterle, non sono state tagliate con la crisi, come dicevo prima, il ministero Tremonti-Gelmini, è un ministero dove si taglia con allegria, si taglia per far fronte alla crisi che sta arrivando, il ministero Tremonti taglia migliaia...

(fine audio 1)

Quali sono le azioni che si possono prospettare sul rapporto scuola/lavoro?

Concretamente, la cosa ottenuta è l'aumento delle ore di alternanza, non è soltanto una cosa che si vuol fare e si fa, è una cosa che ha un costo, vengono individuate le risorse che vengono messe per questa cosa. Siccome, la prossima settimana dovrebbe uscire la prima bozza di decreto legge, per tradurre il contenuto del documento in alcuni primi provvedimenti, forse val la pena (di aspettare e) di metter quella roba lì, nel momento in cui esce, per adesso queste tra o quattro cose che abbiamo detto sono contenute, entro dicembre dovrebbe uscire.

Passiamo allora ai temi più di indirizzo che interessavano soprattutto all'ente che ha commissionato la ricerca: il principio di equità.

Io vorrei fare un piccolissimo passo indietro alle ragionamento sulle caratteristiche del sistema educativo italiano, nel senso che il sistema educativo italiano, quello che viene ritenuto tutto sommato un buon sistema, in realtà sul terreno dell'equità, dell'accesso e del successo formativo, che sono le cose indicate, non è né equo, né tale da garantire realmente il successo formativo e le condizioni di accesso; in altri termini, se noi pensiamo al dato nella sola prudenza, noi abbiamo uno scarto di circa 150.000 individui, fra il primo e l'ultimo anno delle scuole superiori, su un totale di poco più di 500.000, i numeri si possono controllare ma non sono molto diversi da questi, il che significa che ne entrano 650 e ne escono 500, forse in realtà un po' di meno, è chiaro che non sono tutti perduti per sempre, però è chiaro che è questo comunque, al netto, di quelli che passano ad un altro corso di studi, siamo sempre nell'ambito della scuola

secondaria, se tu cominci l'istituto tecnico poi non ce la fai e vai all'istituto professionale, non sei fuori da questo conto, ai 150.000 vanno aggiunti quelli che cambiano. È un disastro che supera il 30/35%, dire che un sistema che ha questo tipo di salti, è un sistema equo, o che si preoccupa del successo formativo, è un puro a nozze, non può essere sostenuta questa affermazione da nessuna parte.

Anche se poi il tasso che noi comunichiamo a Eurostat, sta sui 18%...

Il problema è che noi comunichiamo un dato che riguarda la media generale, sto parlando della scuola secondaria superiore, noi abbiamo dei tassi che ulteriormente, anche nel percorso dell'obbligo tradizionale, vedono delle fasce. La seconda cosa è che noi cominciamo a fare solo adesso la distinzione tra dispersione e abbandono, che sono due cose distinte, ma sono due cose distinte che in qualche modo si sommano, non che semplicemente si tengono due modi diversi di contare la stessa cosa, sono due pubblici diversi.

Però è anche vero che se avessimo un'anagrafe Nazionale decente, potremmo conteggiare gli effettivi, non dico rientri, ma riavvicinamenti al sistema, e di coloro che qualche opportunità educativa la hanno avuta, con o senza diploma finale.

Gli riavvicinamenti al sistema, riguardano, negli ultimi anni, i passaggi dal percorso di istruzione e formazione professionale, e questo, aldilà del fatto che è molto recente e non abbiamo dati storici, però fondamentale è in qualche modo una cosa che incide per qualche migliaio di individui, soprattutto per qualche migliaio di individui con caratteristiche di territorio, distribuiti in maniera diseguale sul territorio Nazionale.

Se distinguiamo dispersione e abbandono, l'abbandono si attesta sul 18% mentre la dispersione, quindi il costo che poi ha per il sistema, colui che non svolge regolarmente tutto il percorso sul 33%, questi due dati insieme sono allarmanti.

Anche perché si traducono in effetti ulteriori, su un altro appunto dal quale siamo partiti e che adesso vale la pena riprendere, cioè il contenuto del percorso di attivazione: l'elemento di maggiore distanza dal successo formativo è esattamente questo, perché se per successo formativo intendiamo il fatto che si raggiunga il diploma è un conto, se per successo formativo intendiamo la spendibilità di questo, l'effettiva corrispondenza, è un altro conto che va articolato, va meglio capito e meglio spiegato, in che senso? Ovviamente, nella non piena corrispondenza fra domanda che viene dal mercato del lavoro e offerta che si porta sul mercato del lavoro, giocano tanti fattori, uno di questi negli ultimi 5 anni almeno, è sicuramente la crisi, altri sono le caratteristiche del sistema produttivo italiano, altre sono le storiche difficoltà del mondo imprenditoriale italiano a valorizzare quello che viene dal Paese. La crisi però, sta spingendo anche alla modifica di una serie di comportamenti, quindi magari l'imprenditore o l'azienda che in qualche modo ha sempre pensato di poter dire "prendo un laureato lo pago come un diplomato, prendo un diplomato e lo pago di meno...eccetera", oggi è più interessata ad individuare le professionalità che gli servono per davvero, e si propone meno il problema di contenere i costi, non che non se lo ponga, ma se lo pone in maniera diversa, nel senso che va ad una trattativa di tipo particolare.

Siamo agli inizi di questo cambiamento culturale?

Sì, siamo appena all'inizio di questo cambiamento, però in questo cambiamento ci sono degli elementi che non vanno sottovalutati, il principale dei quali ci viene testimoniato da un indicatore al quale suggerisco di fare attenzione: si stanno moltiplicando gli accordi aziendali, che affiancano o in qualche caso sostituiscono gli accordi di altra natura, territoriale o addirittura Nazionale; questo significa che noi abbiamo un certo numero di aziende manifatturiere, ovviamente al sopra e al di sotto di una certa dimensione, parliamo di aziende medie, non di piccole o piccolissime, che non potrebbero farlo, né di aziende grandi che spesso sono aziende dedite alla produzione (..?), nelle quali questo che sto dicendo non si può fare o si fa meno, lì l'elemento fondamentale è quello della valorizzazione delle risorse umane, non più come negli anni Novanta e inizio dei Duemila, la valorizzazione delle risorse umane significa potenziare l'intervento sui quadri, sui manager, non si sta più investendo sui manager, si sta investendo su un livello medio, medio-alto, di tecnici, che rappresentano il reale patrimonio delle aziende che sono competitive sul mercato oggi, che incominciano ad esserci, non sono tantissime, però hanno un numero di fatturato che non è piccolo.

In che ambito in particolare ti risulta?

A me risulta in generale, nelle cose nelle quali tradizionalmente l'Italia è forte, la meccanica fine, l'industria dei semi-conduttori, settori nei quali il livello di specializzazione e di specificità, fino a farne essere in qualche caso produzioni di nicchia, è molto alto, che però si tirano dietro un dotto sufficientemente diffuso, che richiede lo stesso tipo di specializzazione e di qualificazione. Quindi io adesso faccio gli esempi sulla meccanica e sul manifatturiero, ma in agricoltura è la stessa cosa, o green economy, che lo è a 360 gradi. Trasformazioni agro-alimentari è un'altra cosa, non è più semplicemente prendere la frutta e fare le conserve.

Il sistema educativo si è o si era già attrezzato per questa nuova eventuale domanda?

Il sistema educativo non era attrezzato se non in situazioni assolutamente specifiche e marginali, marginali è un termine improprio, perché da l'idea di una cosa di settore; noi abbiamo un numero non piccolo di istituti tecnici e professionali che sono assolutamente all'avanguardia su questo terreno e che sono fortemente connessi a realtà economiche e produttive editorialmente significative, cito alcuni casi, l'Avogadro di Torino, il Nobili di Reggio Emilia, L' Aldini Valeriani di Bologna, il Galilei a Roma... sono istituti tecnici di grandissima tradizione ma contemporaneamente sono modernissimi e fortemente collegati ai processi di sviluppo produttivo. In Emilia, nell'arco dell'ultimo triennio, ma in Lombardia è lo stesso, noi abbiamo un non piccolo numero di contratti aziendali e di protocolli di intesa tra scuola e aziende, in Emilia e in Lombardia è la cosa più tipica da questo punto di vista, però ce ne sono nel Lazio, in Toscana, in Piemonte, credo in Veneto e in Liguria anche se è una situazione che conosco meno, in Trentino, c'è un quadro dove esplicitamente il percorso educativo diventa intrecciato con le esigenze di quei territori dal punto di vista economico e produttivo. Naturalmente questo apre un discorso che appassiona molto in Italia, che è quello: " ma allora cosa pensiamo a una subalternità del sistema educativo alle imprese...".

Questo per esempio nei termini dell'equità, favorirebbe a tuo avviso, oltre che un nuovo ciclo di rapporti scuola/lavoro, sistema economico e sistema educativo, anche un'apertura del sistema educativo ad una concezione di equità più moderna, che cosa ha a che fare con l'equità?

Ha a che fare con l'equità nel senso che, dare la possibilità, di verificare la qualità del percorso che si è compiuto e quindi dare veramente la possibilità di correggerlo senza perdite eccessive, è un dato che restituisce motivazione, che dà la possibilità di inserimenti da verificarsi progressivamente, e quindi da accompagnare, perché l'alternanza scuola/lavoro di cui parla la scuola e di cui parlano quelli che la propongono, io fra questi, è un percorso tutto interno al percorso educativo, è un percorso diverso dall'apprendistato e dagli stage, o cose di questo genere, è un percorso che in qualche modo deve riguardare l'insieme dei percorsi educativi, non vale soltanto per l'istituto tecnico e l'istituto professionale, perché analogamente anche nei licei è possibile immaginare questi percorsi di alternanza; allora questo, mescolando un po' le cose, consente di rendere effettivo il successo formativo, che è poi la testimonianza dell'equità.

Più attrattiva naturalmente la scuola e lo studio, quindi invertire la rotta del disinvestimento nello studio, di cui abbiamo poco parlato.

Restituire motivazione.

Agire anche sui ceti già impoveriti? Sul fatto che partendo dai professionali e dai tecnici, la platea dei ragazzi o delle famiglie interessate sia già di per sé collocata socialmente, come più bisognosa?

Io credo che uno degli effetti della crisi sia anche quello di dimostrare a chi vuol credere e a chi non vuol credere, che tutto sommato la corrispondenza sociale, per cui ceti medi e medio alti → licei, e ceti popolari, gli operai, contadini, lavoratori → istituti tecnici, VET, è una corrispondenza priva di senso.

Teoricamente o nella realtà di oggi?

La crisi aiuta a capirlo nel concreto, nel senso che, quando ti rendi conto che il tuo figliolo, che tu hai voluto mandare al liceo perché così ha una formazione sociale, questa roba non funziona, perché non produce quell'esito, quando ha finito va a fare scienze della formazione primaria, se ha una vocazione magari farà anche bene, ma in realtà è destinato ad un insuccesso professionale, nella sostanza, oppure va a fare scienze della comunicazione, o una di queste stravaganti cose che hanno inventato nell'articolazione del sistema universitario, la prima volta potrai pensare che è colpa di tuo figlio che non si è voluto impegnare, ad un certo punto comincerà a venir fuori con chiarezza che è nel sistema qualcosa che non funziona; è chiaro che per far questo devi far sì che in quella scuola lì, in quel tecnico, in quel professionale, in quel liceo tecnologico, ci sono molte cose che possono essere pensate da questo punto di vista e ne devi cambiare l'ordinamento perché altrimenti diventa una cosa complicata, ci sono degli elementi di attrazione e di eccellenza, milioni di insegnanti di quella città. Un cittadino di Reggio Emilia non pensa che se suo figlio va al Nobili, va in una scuola di serie B.

Perché ridiventa fondativo della scelta scolastica, il successo occupazionale, il successo formativo inteso come dicevi tu.

La prospettiva occupazionale, e dall'altra parte la qualità delle cose che succedono. Faccio un altro esempio: l'Aldini Valeriani, che è una meravigliosa scuola di Bologna, è questa roba qui da 50 anni e nessuno ha mai pensato, andando all'Aldini Valeriani, "che sfigato!", ci sono stati momenti più felici e momenti meno felici però comunque è una scuola di eccellenza in senso assoluto, bisogna far sì che l'insieme delle scuole superiori, ognuna a suo modo, a partire da quelle tecniche e professionali, siano delle scuole di eccellenza, allora a quel punto il meccanismo funzionerà. Naturalmente c'è sempre il notaio che pensa che il figlio debba fare il notaio...

Ma la scuola fino ad adesso non ha fatto nulla per modificare questa mentalità. Quindi ho capito molto bene il tuo concetto di "qualità" e lo strumento che tu hai individuato come possibile uscita dalla crisi: questo significa che la tua diagnosi, chiedo conferma, è che il periodo pre-crisi e forse di entrata nella crisi non ha fatto che acuire quella caratteristica di non equità, che il sistema già aveva, ce l'ha dal '23, la matrice Gentiliana, ha tolto gli orpelli, ridando spazio ad una nuova prospettiva, che forse le politiche prima volevano e tentavano di immaginare, politiche deboli, con poche risorse, non hanno cambiato il sistema; quindi adesso si potrebbe riprospettare una ricerca del principio di equità, che non sta tanto nel meccanismo in cui funziona la scuola, essere più o meno selettiva o inclusiva, che sono le due alternative politiche dell'equità, essere selettivi o inclusivi, non è tanto questo il punto che vuoi sottolineare, come funziona la scuola, MA il contenuto della scuola. La domanda è questa: se il contenuto è la prospettiva, è importante perché da fiato ad una nuova idea di equità, dove l'organizzazione va cambiata? in un regime di costi zero e di risorse zero?

Le piste sulle quali determinare il cambiamento, le dico senza ordine: una è la realizzazione dell'autonomia, non è possibile realizzare nulla di quello che io ho detto, se governato soltanto centralmente, e uso non a caso l'avverbio "centrale", nel senso che ci vuole un indirizzo fermo e assolutamente centrale, però lì finisce il compito del centro, bisogna riuscire a tradurre sul territorio, l'autonomia a cui penso io non è l'autonomia delle 8000 monadi, ma è ovviamente quella delle reti, che immagino sempre come reti inter-istituzionali, delle reti nelle quali ci siano le scuole, gli enti locali del territorio, e ci siano tutti quelli che ha senso che ci siano a seconda di quale territorio stiamo parlando; questo è il primo elemento. Il secondo elemento sono le tecnologie: cioè l'organizzazione oggi, non può prescindere dal fatto che non può essere l'organizzazione negli stessi spazi e con le stesse modalità, della giornata scolastica, così come la conosciamo, le tecnologie consentono di fare quasi tutto, le tecnologie non sono semplicemente le macchine che si mettono a disposizione dei soggetti che sono dentro al percorso educativo, insegnanti e studenti, ma sono un volano del cambiamento della didattica e (...?). Quindi sostanzialmente si tratta di riorganizzare il percorso educativo, partendo il più possibile dalle persone a cui tu lo rivolgi, la personalizzazione dei percorsi educativi è uno strumento che senza le tecnologie non puoi fare se non col precettore.

Il valore che starebbe dietro a questa pervasività tecnologica maggiore, sarebbe la personalizzazione.

La personalizzazione e in qualche modo la possibilità di scomporre e ricomporre il percorso.

È corretto che la personalizzazione è il valore, la tecnologia è lo strumento?

La tecnologia è lo strumento, il valore è la personalizzazione finalizzata, la personalizzazione è sempre il discorso del successo formativo di cui parlavamo prima, l'equità.

Quindi autonomia, tecnologia, il terzo elemento è l'intervento, in qualche modo, sull'ordinamento: noi abbiamo una struttura per cui nelle nostre scuole si sta un certo numero di ore, in genere pochissime, cinque, sempre meno, praticamente c'è un quadro pressoché immobile di quella dozzina di discipline. Io credo che un giorno andrebbe fatta una discussione seria su alcuni sistemi educativi di altri Paesi, per capire se dipende dal fatto che essendo al Nord d'Europa o da un'altra parte, hanno il cervello fatto in un modo diverso, cosa che tendo a pensare che non sia possibile, o se oppure discendono da una riflessione e una ricerca educativa sensata; noi abbiamo per esempio meccanismi nel Nord Europa, la corrispondenza di quelli che noi chiamiamo i licei, che hanno un pacchetto di discipline, piccolissimo, 5 o 6, che sono assolutamente obbligatorie per tutti, poi una gamma di decine di articolazioni disciplinari, poi ci sono le attività, ma aldilà delle attività, c'è il fatto che mentre la lingua madre, l'inglese se non è lingua madre, la matematica e non so cos'altro, ma altre due o tre cose, sono comuni per tutti con un pacchetto di ore definite che deve essere fatto nel corso dell'anno, non c'è l'orario settimanale, da nessuna parte, c'è l'orario annuale che viene composto e scomposto sulla base delle decisioni che sono diverse fra quelle della MIA scuola e la TUA, che è quella confinante, perché sono diverse le persone che sono impegnate.

Smontare l'orario settimanale significa togliere un totem all'interno dell'organizzazione scolastica.

Sta già scritto nel 275 che abbiamo scritto nel 1999, non è una cosa che ci stiamo inventando nel 2014-15, e non c'è norma che lo impedisca.

È qualcosa di molto culturale e di normativo.

Io penso che queste tre cose che riguardano l'organizzazione sono fondamentali ed è fondamentale il fatto che procedano assieme, tentare di affrontarle una alla volta...

Rimane solo l'ultimo accenno, qui forse puoi andare veramente veloce con una risposta, è il tema dell'attualità, che naturalmente è connesso a tutto quello che abbiamo detto fino ad adesso, noi l'abbiamo sposato gradualmente avvicinandoci alle misurazioni internazionali, e quello, per il sistema educativo italiano, è una relativa novità degli ultimi anni, giusto? Possiamo dire che c'è stata una crisi, ma c'è stata anche una cultura della valutazione, anche solo per l'effetto della Costituzione degli Invalsi, va detto a livello internazionale che noi ci siamo riposizionati: ora quello che ci chiedono i nostri partner portoghesi, che invece sono stati indotti alla misurazione della qualità da ben prima di noi, queste misurazioni di performance, eccetera, si scontrano o si incontrano con la ricerca dell'equità, come finalità generale del sistema? Possono essere d'intralcio o possono essere di fatto un aiuto, una stampella, della ricerca dell'equità?

Io della valutazione penso una cosa precisa: la valutazione è un insieme di processi diversi, pensare di ridurla ad un solo processo, come spesso è stato fatto dai favorevoli e contrari, è un danno, nel senso che non produce effetti positivi. La valutazione è un insieme di processi nel senso che non è possibile immaginare la valutazione senza l'auto-valutazione; non è pensabile che arriva uno e mi valuta, se non si parte da una auto-valutazione che deve essere fatta; non è pensabile fare l'auto-valutazione se non ci sono dei benchmark, che vengono dalla valutazione esterna, quindi da altro, che consentono a me di misurare, altrimenti su che base mi valuto? Mi metto allo specchio, son carino o son brutto? È difficile che sia un discorso oggettivo. Se invece so quali sono i benchmark che devo tenere presenti posso auto-valutarmi, dopodiché spetta alla valutazione esterna. Quindi abbiamo 3 processi diversi che si devono mescolare in qualche modo, a questi 3 processi, a me sembra che ne vada aggiunto almeno un quarto, che è il cosiddetto bilancio sociale dell'azione educativa, gli effetti a lungo termine, che è quello che riguarda la replicabilità, riguarda le ricadute sul piano occupazionale; questa roba è importante se si riesce ad evitare che sembri il bilancio sociale degli studi di credito, per cui tu fai un adempimento inutile e anche costoso, deve essere una roba che riguarda l'occupabilità, che riguarda l'insieme del percorso.

Qual è la misura o lo strumento, il dispositivo tra quelli messi in campo in questi ultimi due o tre anni dalla costituzione Invalsi, che ti convince di più su questo piano?

Il sistema nazionale di valutazione va largamente costruito, siamo ancora agli inizi, bisogna fare un ragionamento: il bilancio sociale presuppone tante cose che adesso forse è troppo difficile (elencare), il benchmark si tratta di capire che bisogna guardare fuori dall'Italia e dentro l'Italia, prendere quali sono e fare un lavoro serio di ricerca su queste cose e vedere quali di questi benchmark possono essere spendibili; e anche lì non bisogna pensare che c'è il benchmark, ce ne sono diversi; e anche dalla scelta del metro che io vorrò adoperare, poi partirà la valutazione sul mio percorso. Seconda cosa, l'auto-valutazione, anche lì vanno forniti degli elementi che la articolano e consentono di passare da una valutazione che non può che essere sommaria, poco più del curriculum, che mi dice chi sono e cos'ho fatto, ad un cosa più complessa, si chiamano studi di caso, che approfondisce le due o tre cose che secondo me, perché è un'auto-valutazione, io metto sul campo, come fosse il capo-lavoro che i maestri artigiani mettevano sul tavolo ad un certo punto, e così via. Da questo punto di vista invece la valutazione esterna è più semplice, perché è innanzitutto la valutazione di queste cose, e dopodiché, vado a vedere, se tu hai scritto che sai sei lingue e poi non ne sai nessuna...

Questo è un altro tema, quanto “confidence” possiamo vantare in Italia, dato poi i nostri livelli di corruzione, non possono non riverberarsi poi sulle culture valutative; siccome siamo in un ambito internazionale, è giusto caratterizzare secondo me culturalmente tutto quello che abbiamo detto.

6.3- Greece

Topics and Questions ECSE

Answers: Faculty member, expert on educational policy, assistant professor at a Department in Athens, Greece

Received Date: 12-12-2014

1.

Topics: Educational Policy and Political Cycles

Questions:

a) Considering the last decade (2000-13), how do educational policies have been influenced by political cycles?

As a specialist in higher education policies, I would say that, to a certain extent, policies have been influenced by conservative political cycles being in power. However, international influences have played a decisive role, as the most recent higher education framework law (no. 4009/2011) is influenced by the Bologna Process and especially the Lisbon Strategy. These influences are about the issues of: a) *mobility, attractiveness and internationalisation* of European universities, b) promotion of *lifelong learning* and the policies of *accreditation*, through the generalisation of ECTS and the introduction of EQF, c) *quality assurance* and accountability, d) promotion of *new public management*, e) *reduction of state funding*, linked with the results of evaluation, f) *linking education and research with the labour market*, g) promotion of *research, innovation, and excellence*.

b) Which were, in your perspective, the main tendencies?

Overall, Law 4009/2011 continues the logic of previous (the 2000s) policies, in the sense that it promotes “academic productivity”, “market responsiveness”, “accountability” and “quality” assurance, the “evaluative state”, “academic capitalism”, the emphasis on graduates’ employability and lifelong learning. Most of the above policies are strongly associated with the withdrawal of the welfare state and the unwillingness of governments to fund universities. And Law 4009/2011 promotes this issue even more (compared to the 2000s reforms), in particular through policies about *mergers, partitions, renaming and abolitions of Universities, Faculties and Departments, and change of their seat, for “rationalization” reasons*, policies, that is, more directly linked to economic crisis in Greece.

2.

Topics: Equal opportunities in access and success; crisis effects; the role of policy-makers and stakeholders

Questions:

a) Does the current economic and financial crisis impact the equity in the educational system? If yes, then how?

(Please, provide information if possible on social inclusion and/or exclusion aspects of the educational system).

Reduction of state funding, associated with the withdrawal of the welfare state in Greece - especially in times of economic crisis - has a direct negative effect on the issue of equity. Sociologists of education have certainly argued that the massification of the higher education system does not give an answer to a “true” equality of opportunities, due to the internal differentiation of the system and the social inequalities still existing outside it, in the wider socio-economic context. However, this cannot be sustained as an argument for the reduction of public funding and the tendency for the reduction of student numbers, or policies of promotion of various aspects of privatisation of the system (introduction of students’ fees, funding from sources other than the government etc.). Such policies undermine the idea of education as a public good and the support of public services (education being one of them among others such as health etc.) as a priority of social policy and the welfare state.

At this point, it is important to note that data from the Greek ministry of education show that although between the years 2001 and 2010, there was a slight increase of the entrant students in higher education (from about 80.000, they became 84.000), in the academic year 2011-2012, the number of entrant students went down to 74.000.

Furthermore, analysis of data from international data bases, namely IPUMS-International and the European Social Survey, has shown that between the years 2001 and 2010, there was an increase of unemployment of graduates of both the university and the non-university (technological) sector of higher education in Greece.

Regarding the impact of the economic crisis at the University, the measures of fiscal adjustment in Greece had a number of impacts on fundamental aspects of the organisation and operation of the Greek higher education institutions (reductions in staff, wages and benefits reduced, limiting funding, shrinking property, abolition and mergers of Faculties and Departments, etc.).

b) Which are, in your perspective, the main challenges to be identified?

Research in the European context has shown that quality assurance policies (strongly promoted by the E.U.) are associated with reduction of public funding due to the withdrawal from welfare states, as indicated above. It is, therefore, important that the social actors (academics, students etc.) resist the above policies through their active participation in decision making both in national and international contexts.

However, it is equally important that they work towards a coherent system of evaluation of higher education institutions, which will emphasise peer reviewing and internal forms of evaluation, leading to quality with reference to the rules of the different disciplines, otherwise “university work” (instead of “university productivity”). This is a major challenge for the Greek universities, which do not have a long tradition of an evaluation system. Academics should

assure, in intellectual and disciplinary terms (not in terms of “market responsiveness”), the quality of the institutions they serve, by being involved in the improvement of the evaluation framework.

3.

Topics: System performance, guarantee of equity, evaluation mechanisms, crisis effects

Questions:

a) Do you consider that the existing mechanisms to evaluate the quality of your country’s educational system have been, so far, contributing to the promotion of educational equity? Could you give some examples?

For the reasons I explained in my answers to 1b and 2a, I think that these policies do not promote equity, in the sense of equality of educational opportunities and the idea of education as a public good.

b) And since the current financial and economic crisis, which have been, in your opinion, the main political reactions in terms of educational policies targeting the quality of the system?

Could you give some examples?

Social actors, particularly with respect to a considerable part of the academia, exert critique on the above policies. However, in practice they are slowly but steadily following the rules deriving from the legal framework.

Thank you!

Expert Interview with a Faculty Member in Education Policy at a University in Athens, Greece

V. Kantzara, Ph.D
Associate Professor
Dept. of Sociology,
Panteion University of Social and Political Sciences
vkantz@panteion.gr

Interview transcript

(I=Interview question & A=Answer)

I: Good afternoon and thank you for accepting the invitation. The topic of our interview/discussion is about educational changes and the crisis in Greece so please could you tell me, how in your opinion, if you take in consideration the last decade, how do educational policies have been influenced by certain political cycles and maybe [you could mention] which ones?

A: Thank you for the invitation for this conversation I am a specialist in higher education policies so I am going to talk about the policies in this area. I would say that to a certain extent policies have been influenced by conservative political cycles in Greece being in power during the last years. I have done some research that show international influences are really strong and actually they have played a very decisive role in the most recent higher education policies, especially those referring to a framework law that it was passed in 2011 it is a well-known law 4009 passed in 2011 and this law is very much influenced by the Bologna Process and especially the Lisbon Strategy. And these influences stemming from European education policy mainly are about issues such as a) *mobility, attractiveness* and *internationalisation* of European universities, which is promoted also b) *lifelong learning* is promoted and the policies of *accreditation*, through the introduction of the ECTS which is of course an old phenomenon but also there is somehow a network that the European Qualification Framework (EQF) concerns also higher education, also universities which is a policy originated from training policies, European policies on training; also another issue regarding these influences is the issue of c) *quality assurance* and accountability, which is very strongly supported and promoted; also d) *new public management* is promoted; there are efforts for a e) *reduction of state funding*, and funding is very much related to the results of evaluation, regarding the latest higher education framework law; and also there are efforts for an effective f) *linking of education and research with the labour market*; and finally g) *research, innovation, and excellence* are issues to be promoted and they are very much associated with the previous issues.

I: What do you think about the main institutions that have been introduced that they are new to the Greek context during the last couple of years.

A: During the last couple of years the main institutions

I: yes

A: the main institutions? There is an intermediary body between the Government and the universities which is Higher Education Quality Assurance Agency, which is a new institution and which carries out the evaluation of these institutions for the state really, because the state has still a very strong role; it is the idea of the evaluative state, which has been, which one can see in Greece during the last decade or so, the idea of the evaluative state that the state exerts control even stronger control but it does not exert directly there is an intermediary body between the state, the central government, the ministry of education and the institutions which has this role of evaluating externally the institutions and making judgment which are unfortunately related with the funding of these institutions.

I: Do you think that some of these tendencies are related to make or to control or to force universities to work towards linking education to the labour market?

A: Yes, **I:** how?

A: Yes, because actually they are evaluated positively if they [universities] are doing well with this effort linking education with the labour market.

I: How do you think about these new [administration] bodies that have been introduced within the universities, we have relatively new structures of management,

A: yes ...

I: [I mean] all the [relevant] departments united as faculties, and there is a provost on top, I think it is in English, the Greek word is kosmitoras [provost], and we have a Council which is new to the university, to the idea of the university.

A: yes, the council. The council of course there is a new body within the university, a new body of administration which did not existed before; it consists of both internal and external members, which means there are also members of wider society from the enterprises perhaps or the social partners so, who may have a saying in the role in the directions of the universities in the aims the university is going to set so this changing the management of the university in the administration in the decision making within the university is related to the idea the university has to respond more effectively to the needs of society; but in society you know in the labour market, that is to respond effectively to the market, because these are all efforts to make a market driven university, an entrepreneurial university.

I: These changes alter a lot the character of the Greek university; it used to be more academic, what is your opinion?

A: Well yes, the university had historically the tradition of the Humboldtian model of the university as this is the case with universities in Europe and the world of course but there is a shift not only in Greece but also in other European countries; since the '90s there is a shift this withdrawal from the Humboldtian model of the university where the idea is the link, the idea is linking, is the link between research and teaching and that both professors and students are in this institution to promote knowledge and science; but not that there is no an interest what society needs, but the initial part of this is free to pursue the free discovery of truth.

I: how do all these relate, these are management structures, but how do they relate to the quality of the studies? Does that affect the quality of the studies or studying, in your opinion?

A: yes, they are affecting though certain policies, like, ah, the emphasis that has been given to the learning results and the emphasis on the learning results is pretty much associated with this ideal of whether university education is linked with what the market needs; if one checks the main questions in the questionnaire regarding this learning results, one can see that there is a clear part that goes this direction so the content of studies is very much affected; especially the focus, if the focus is on developing student skills, related to what, what the needs of the market are, because in these policies they use the idea of society, but they really mean the needs of the market, so there is a shift from the emphasis on science, on the disciplines, on the promotion of knowledge and the discovery of truth to learning, learning which is related to the needs of the market so this idea affects the content of studies in my opinion and it is very much related with the vocationalisation of education that is promoted, because if you emphasise skills, you promote the vocationalisation of universities; so there is, I think all these policies affect the content of studies gradually.

I: Do you think that the evaluation of professors by students is also something new?

A: it is not new, it was something that has been introduced a few decades ago, but it was not really, it was introduced in the framework law but it was not implemented, it was only implemented when the policies of evaluation became compulsory, so it is not very new.

I: it was in the law of 1982?

A: Something like that, it was, I think, but these policies were never enacted in practice.

I: so do you think evaluation gives students more power, because they can evaluate their teachers but at the same time this power is taken away because students are restricted in numbers in the representation in the management [bodies]; they do not participate anymore and are not represented as it used to be, only one student, only in this council of the university, which it makes them weak I would think.

A: Weak as social actors, but they are seen as individuals, the power they gain through the emphasis on, through assessing their professors work etc. is like about the idea they are individuals who are consuming educational services and they are assessing them but they are social actors in this in the way that they are in the university and they can have decisions and they can participate in the decision making as members of the academia.

I: Do you think that this evaluation mechanism or whatever we have now at this moment does it contribute maybe to have more equity in the education system? There is evaluation everywhere and the idea is to make the system better, more effective, or whatever, but is it more equal? Does it have an effect on education?

A: Yes, I think the idea of equity as equality of opportunity which is an old idea and very much contested, well sociologists of education can say a lot about this, the expansion of higher education has not really given equality of educational opportunities, because there are inequalities in society from a Marxist perspective, but eh, I think that until the 90's in many European countries there was given a priority to this equality of opportunity however contested it may be, it was still this idea of education as a public good, that is a public good and the state has to fund education and of course there is always this idea that higher education has to be economically effective in the sense it should give the qualified people for the needs of the labour market; but since the '90s and in Greece later on because there is a gap in Greek policies, they are lagging behind in time, in relation to other European countries there is there is a shift to the emphasis in quality assurance, in economic efficiency in the sense of quality assurance and there is not much interest in equality of opportunities. Higher education systems have been massified, have been expanded in many European countries including Greece and but now the state has changed its interest from the input which used to be before, student numbers, funding etc. etc. to the output, what are the results of the university and how they are related efficiently to the needs of the market, so there is not so much interest in equality of educational opportunity as it used to be before, and this interest in the output of the universities, is very much associated also with the evaluation processes is very much linked to funding, so, there are cuts in funding coming from the state, universities are encouraged to seek funding from other sources than the government; so if there are cuts in the public sector this in higher education as part of the public sector then this has great effect on equity issues, especially if the universities are evaluated positively if they are doing well in attracting funds from sources other the state, and these sources other than the state maybe are also student fees, so the introduction of student fees is a policy that is not coherent with the idea of equality of opportunities.

I: unless it was complemented with other measures like student' subsidies, grants or loans.

A: no **I:** no

I: that means that the students' fees that have been implemented in postgraduate studies programmes that is may have influence in terms of equity and at this moment only Panteion and some other universities have postgraduate studies without issuing fees, many universities have introduced fees.

A: yes, the first step has been taken in the master's courses

I: yes, the master courses

A: but there is this tendency that they are introduced maybe in the future in the undergraduate, we 'll see how things will be;

I: yes, we' ll see how things

A: I am mostly talking about fees in the undergraduate courses, but this is not the case in Greece yet. But this policy of introducing fees is not consistent with the idea of equity.

I: no, do you think the quality of the system will be guaranteed? Did any measures were taken for [ensuring] the quality of the education system?

A: who are we talking about? About which actors?

I: I am talking about [educational policy and] the quality of the system. The question is about equity, so I wonder how certain policy guarantees quality

A: yes, there are policies but towards the direction we discussed before, because the idea of quality, it's how we interpret the idea of quality, so I think that the idea of quality in Greece, is interpreted in the context described before, so in this sense there are efforts, to targeting towards the quality of the system, but in italics the quality, in italics and meaning quality, quality means making higher education system, the universities, more responsive to the needs of the market. So, in this sense yes, there are efforts.

I: This kind of quality (?) not the quality we had before and how to retain the standards we had before the crisis; we had certain standards about books, textbooks, students received a syllabus [reader], they had rent, right to a rent subsidy, lunch or whatever; and these have failed now. So the strategies has been [I wonder] not to retain any quality [?]. What do you think of that? [**A:** consents in all these, by saying yes, yes]

A: this is the situation we academics are now, we don't have access for example to journals, to our libraries, the universities cannot function towards quality of studies anymore in Greece because of cuts. I am not saying that the situation before these policies was great, and that we don't have to do anything to improve the system, to improve the universities I am not saying that, but I think that all these policies are not encouraging quality of studies in the sense of learning, researching the disciplines in the framework of the disciplines.

I: So it remains the same system but towards the labour market, which is a bit contradictory actually

A: Especially in the context of Greece; one can make the big question, what is the market in Greece, especially at times of crisis, economic crisis, [ironically]

I: and massive unemployment rate of the youth

A: But this a big issue, but also a big question to have it in mind regarding these policies

I: What do you think, what is your opinion about the direct or indirect effects of the crisis on the education system. First [I would suggest] let's talk about the impact, then about equity and then about what are the main challenges. I know it is a big question.

A: Yes, the reduction of state funding is associated of course with the withdrawal of the welfare state in Greece and this is especially in times of economic crisis what is happening, and this situation has a direct, negative effect on the issue of equity, as I said before, these policies are undermining the idea of education as a public good and the support of public services, education being one of them so I think these policies have a negative effect on equity.

I: Do you think more students study now than before? Do you have any idea?

A: Well as far as I know there is a slight reduction, but I can't talk with numbers now, very slight and somehow it is related with the merging of institutions in Greece, which has taken place recently in the last one or two years, but I wouldn't say there is a massive, I wouldn't say the reduction of students is high, but the universities are urged to do more with less funding, more and more with less funding

I: and also the massive reorganisation abolishing the universities, we had this *Athina* [plan to change tertiary education], the second wave is coming

A: The second wave is coming but we don't know yet,

I: what do you think will be the future, what are the main problems and what will be the future

A: you mean the situation in higher education **I:** yes

I: At this moment we work more with less

A: So let's predict how the situation will be

I: [About the actors] how the actors are moving, you know you mentioned, social actors are resisting policies; some of them [changes] are implemented slowly, some of them are not implemented: for example the law of 2011 makes part time studying possible and this is implemented; that there will be an office to help with teaching, this is not implemented; that there will be a mentor [for every student] this is not implemented. So what do you think the situation is going now to work; do you see something is changing?

A: It is a very difficult question, but what comes in my mind is that these policies are very much at the beginning have come [and have] been introduced in Greece because of European influence because in a way some policy is transferred from other university models, so how things are going to evolve in a certain country with certain characteristics of social formation, socio-economic- political characteristics and in country with a tradition, certain education tradition; all these factors, the social framework and university tradition in Greece have a say on how policies will develop in the future so what is being attempted to be introduced in Greece faces the social actors and how they, how the academics for example are involved in certain policies; they are faced with policies with the social formation, for example we have policies that try to make a market [out] of the university how this can be working in Greece with the economy as we know, you know, so I think that these policies are gradually with the resistance of course but they are gradually being... they are not going to work towards the desiring purpose, which is making the university more responsive to the market because the nature, because the market in Greece is not giving jobs to people anyway, so the university loses its academic character and at the same time is not responding to the market, because there is not a market in Greece, so we are destroying the university for nothing, even if we accept this neoliberal idea, this neoliberal framework it is not working in Greece in any way, so I think is all about destroying the idea of the university.

I: Do you have information about what happens to the other parts of the education system in primary in secondary education because of the crisis

A: I am not a specialist

I: I thought maybe you had an idea

A: I cannot speak as a specialist...

I: as an academic?

A: yes, of course, yes; very much emphasis is put on evaluation procedures also in schooling evaluation of teachers; this evaluation is very much related to cutting jobs for teachers, this situation is very much related to economic crisis in Greece and efforts to reduce funding in public services.

I: For example now we had in 2013 a new law in Lyceum for the upper secondary education which is going to regulate access to higher education. Do you have any information, do you know, or do you have any information how it is working or whether it is working positive or negative?

A: As far as I know, yes, there is an effort to change the way of entrance to the university, in relation to certain field of study; I think there are six fields guiding students to certain departments, schools; I don't think this is a very radical change, it is not a very radical change, you know a minor change but the

idea is always the same, that students are taking exams, to a certain university department either in the sciences or the natural sciences, public health professions, or other sciences etc.

I: It is very early because it is just being implemented, and from the 1st year of Lyceum part of the grade counts for the entrance exams, and that means exams questions, which is of the teacher of the school, the responsibility is again not on the school but on another body, that means they have to follow frontistirion [private preparatory school], they start a running race, this is the critique, I don't know myself but this the critique that they are starting a running race to enter university very, very early, from when they are 15-16 years old,

A: Yes, and they have to make decisions earlier than before and they cannot change easily their decisions, they are urged to make decisions very early so this might be, may have a negative effect especially for students from social, from lower social classes,

I: yes, and this is related to other subject I would like to ask you about, there is a critique that we go towards privatisation of education. Greek education system is a public good, as you said yourself is free of tuition fees at all levels more or less; ok, it costs a lot of money to study in another city but studying is for free, but there is a certain indirect privatisation, could you say that this is true or this is it takes place

A: an indirect

I: indirect or direct, for example students cannot receive the syllabus [reader] for free for example

A: yes,

I: which means they have to pay it themselves, ok it is not much money but if you take all the courses and in Greece we have a lot, if you want to take a degree in Greece you have to take about 40 courses,

A: also an indirect may be the introduction of coupons

I: yes, yes

A: of students' coupons it might be introduced also in Greece, this is an indirect privatisation, perhaps

it is being an American model, there is a discussion, not it will be introduced, but there is a discussion about this, or am I wrong?

I: there was a discussion, and just before the crisis there was a discussion; it [the studying coupon] is being introduced in England or in Sweden(?) I don't know; it means that the funding does not go to school it goes to the students, and the student can have this funding and give it to the school and there are other problems of course.

But here for example a lot of things that you are studying foreign languages, things like that you do it in the private sector you don't do it in the public sector to succeed the entrance to the universities you have to go to the frontistirio [private preparatory school] or you don't have to but the chances not to succeed and that is a sort of privatisation or not? Or that if there are not enough places to the universities, then you go to a college,

A: yes,

I: I don't have any numbers, do you have any numbers of the student population studying in colleges in Greece

A: no, I don't have numbers

I: and it is very difficult to find statistics in Greece is

A: for those who want data on certain things it is a big problem in Greece.

I: do you think, [I am asking] just your opinion if I see all the educational policies they are not so much about the quality of learning, of the books or the methods, if they did we would have more facilities but they do a lot of efforts to install new [administration] bodies and to do something about the management, so it looks as though education in Greece is not about learning but it's about politics; that education is more a political thing than a learning dimension, do you think this is the case? It's my idea

A: Yes, in many cases this is the case also in respect to higher education we discussed before, yea

I: because when we had this putting similar department in a unit called School, I mean Faculty, we say school in Greek, then I asked myself a very naïve question if I have a problem about you know to find a chalk, or to find a power point installation where do I go? In fact, there is no provision about it.

A: Yes, I understand because the emphasis is given on the program of studies and not to a department. Of course the department is not yet abolished in Greece but its initial 2011 framework law number 4009 departments were to be abolished and they came back as entities were retained as entities in the next law, 2012 so the departments are still existing, but if you emphasise the program of studies then you don't have an entity, and you cannot participate easily in decision making processes as a staff member as an academic

I: it is what you said before they become more vocational or there is a tendency to make studies more vocational

A: Yes,

I: then you need libraries, you need facilities you need to have access to journals then you need to have funding to organise conferences, before the crisis we could organise a conference with funds from the university, we can't do this anymore

A: we cannot participate in conferences easily outside of Greece anymore but we are still evaluated for international participation [laughing ironically] international presence, conferences etc. etc.

I: yes, so, what do you think are the main challenges, the main problems of education that faces right now because of the crisis because of the educational policies that have been issued from half [way?] and some of them not [even] half [of them]

A: The challenges, the problems have to do with underestimation of the equity, equality of opportunity, aim and also with the failure really of the Greek university we speak of the Greek university to respond to the market because of the economic crisis in Greece as I said before we have a university, a situation makes a university losing its academic character because all these policies are related with the withdrawal of the Humboldtian model of the university and all these efforts are being made for making the university more responsive to the market, but the market, the nature of the labour market in Greece is very much discouraging, so the problem is that you try to make a university, former university to respond to the market but the market does not have jobs for people, certain jobs for people so this is the big problem you try to vocationalise higher education towards the needs of the market, but the

market, the nature of the economy in Greece is discouraging towards this direction and the problem is, the big problem with these policies underemphasise equity issues especially through the reduction of state funding and the idea of the university.

I: Did you hear about, it is very difficult for me to find statistics about this drain-brain phenomenon, have you done anything or have some more information about it, about this tendency of highly educated to emigrate abroad.

A: yes. I don't have, I haven't made a relevant research with data etc. but there is a certain tendency being discussed about, about young people well qualified leaving Greece having left Greece, to find a job abroad in Europe or outside Europe there is a big tendency so we have imi- emigration of young very well educated and qualified people going to other countries for better chances this is a big disadvantage for Greece a big problem for Greece

I: The other related issue I forgot to ask you about before is, do you think universities, higher education is doing anything to attract more people for instance students with disabilities, migrants or from other established minorities?

A: no [emphatically]

I: no

A: I don't see any policy officially at least [laughing ironically] from the central actors you know I mean from the government, I don't see such sensitisation for social minorities and for people
[interruption to change tape]

I: We were talking about adult [education] what they [policy] do about adults

A: there are no policies encouraging adults to enter higher education, adults in Greece, if they wish to enter the university for the first time, they have to sit the entrance exams with youngsters which is outrageous; and there are not there are not special courses for adults preparing them to enter the university, also the university itself is not working towards this direction towards covering the needs of mature students; also there are not very serious measures towards social vulnerable groups in general to enter university or to participate on equal terms in universities while being in universities; of course there is some easier access to some people from disabilities, from people of special needs there are given possibilities to these people to enter without taking the exams, but when they enter the universities they are not always given you know equal opportunities; for instance if you have blind students they can't have, they cannot study the books, so, the Greek university is not really working towards this direction, the policies are not very much sensitive of giving to people, people who need it, to participate on equal terms.

I: I heard [that] this depends mostly on voluntary work [for example help disable students to navigate around at the university buildings]

A: yes, but this is not enough, what can you do if you have a student who can't see and you wish to study certain books or articles what can you do as a professor for this student so volunteering is not always enough, it's not enough

I: I read that some times in the libraries some people to translate the books in the braille language, or some people who are paid few money to translate or other volunteer to pull the wheel chair ...

A: do you mean this?

I: there is some kind of volunteer work but as you say this is not solving the problem and there is no policy about it

A: yes of course

I: The other issue I would like to ask you is how about lifelong learning because this was also in the law of 1982 and still is here that university have to work towards life-long learning, does it work towards this goal?

A: Towards lifelong learning; ah, the idea of lifelong learning has been introduced by the European Union ok? there are certain policies in higher education in the last decade or so, from the beginning of the 2000 there is European educational policy which is promoting lifelong learning within the universities, [pause]

I: what does it mean?

A: this is a big discussion, life-long learning as a concept we take it from the theoreticians of adult education, lifelong learning means learning through life, learning from the time you are born till the time you die and learning through various ways, through formal or non-formal education and also through informal; there is also this idea of informal learning, which means that you learn not necessarily from your participation in educational organization, you learn to reading newspapers, or to reading books in the library ok? This is informal learning, but because of the emphasis of the European Union in the aim of, employability, there are four aims in lifelong learning: employability, social inclusion, active citizenship and personal development. The European Union emphasises employability through its policies; it is somehow associated with social inclusion through entrance into employment but the interest of the European Union is in employability, so there is a shift a change in the use of the term, so since the European union started being interested in lifelong learning for employability reasons, lifelong learning means continuing vocational educational training, so if we speak about lifelong learning especially in the case of higher education means training means people being trained a, carrying out or participating in short courses, which are very much related to their jobs, so it means training for employability of people for entrance into employment or for being better in their existing employment, so this is how lifelong learning is being promoted within the university and the promotion of lifelong learning within the university is related with the idea of vocationalisation of higher education and the emphasis on skills,.. that the market needs, the labour market. There are some efforts as far as I know in Greece towards this

I: really? **A:** some other not, not yet, institutes of lifelong learning within the universities, developing short courses, delivering short courses for professionals outside the university.

I: I know that the University of Athens is doing this, but now they call it lifelong learning but they used to do it before that, before the new law, and now they baptise it lifelong learning but it is not being translated into the idea of giving adults the opportunity to study at the university as it is was, as it is with different exams

A: no, no it is not a second opportunity given to adults to study,

I: yes

A: a, it's about, in many cases it is about training, giving more training to people or to professionals, but ok this is the idea, but I wouldn't say that.. the university's role is not, shouldn't be in this direction, like towards developing people's knowledge and skills even after they have left their initial higher education, so the whole idea is how these studies, how lifelong learning centres within universities will develop and towards which direction and there might be taken as a chance to offer opportunities to adults to study a certain discipline.

I: but this is usually not a diploma, like a university diploma, it's just a certificate

A: no, it is a certificate and usually people who are participating are people who already hold a degree, in a relevant discipline, so it is mostly about developing knowledge and skills to people who are already well qualified.

I: Yes, a very interesting development; you said before, at the beginning of this conversation, that one of the tendencies for the Greek for higher education is internationalisation, how do you think this is implemented?

A: It is implemented; well the idea of internationalisation has been implemented a long time ago through the Erasmus programme, through the cooperation with European and international research projects, etc., so it is not new, but the latest policies are encouraging universities towards, very much towards this direction, towards mobility of students and academic staff, towards evaluating positively research projects from European union for example, if academic staff is participating in significant number of European projects, European funded projects is good for [certain?] department, ah, they are encouraging very much, policies are encouraging even more strongly the idea of mobility of academic staff and students and all these data is taken into consideration in the evaluation procedure.

So internationalisation is given a great emphasis and there are also more possibilities given now, it was not the case before of visiting students, of visiting other university or of accepting people from other universities outside Greece to teach in your department, there are more possibilities given now in relation to internationalisation.

I: what is the reason but I will not ask it now, it is a difficult question, a long question-answer I was interested how come this kind of measures were not introduced before, the idea of part time teaching the idea of visiting abroad the idea of inviting colleagues, the idea of having courses in another language than Greek.

A: yes,

I: This is good for the academic university, how this relates to the market.

A: Behind it I think is the emphasis on mobility, e, that all these policies... all these policies, [looking for words] I: make it easier, facilitate

A: facilitate mobility, mobility are associated with the promotion of knowledge and research and innovation, and excellence [slightly ironic] so that the European Union becomes competitive economy in the international context as it was set in the Lisbon strategy of 2000. So all these policies put this emphasis for mobility reasons and behind the idea of mobility is the emphasis is the creation of knowledge for competitiv- the promotion of knowledge and innovation and research, promotion of education and training, innovation and research, so that European union becomes a competitive economy in the world as a whole; so I think this is the reason, but perhaps one can take some chances through these policies [laughing] why not like meeting other people

from other universities and developing their disciplines [[laughing], so it's all about, sometimes it's all about how social actors are acting related to these, to these policies.

I: and the last question, one of the last questions I come back to this question because it is very interesting for me, except from the funding in education, the diminishing of funding could you see any other effects from the crisis on education?

A: could you repeat the question?

I: except from funding; the funding has been diminished and not only active funding also the money stock of the universities have been taken away, also for schools there is really no money; but suddenly there is a lot of money for extra seats and extra management; many of the [works] like cleaning many and things like that have been outsourced now, for this we have money, but we don't have money for the study that's the context, the effects of the funding; do you perceive any other effects of the crisis not directly related to the funding, as a remote consequence or indirect **A:** ... **I:** or maybe in longer terms

A: longer term, yes **I:** we are six years in recession.

A: I think all these policies either related to the reduction of state funding or to the market driven university have an effect on knowledge and disciplines in the long run so the problem is how disciplines will develop in the future, what the future of certain disciplines will be like humanities, or social sciences which are, which cannot sell their product so easily in this context; but even for the natural and technological, or the sciences and the technological sciences, for technical scientific knowledge, there might be an effect a bad effect in the long run like if you promote research, that is, ... and that the labour market needs at certain instances and do this research because you have funds for this kind of research and do not do other type, another type of research that perhaps would promote knowledge and develop certain disciplines in the long run, so in the long run I think there will be a problem with the nature of knowledge and the development of disciplines

I: yes, ... if there is no funding ...; because the side effects are that many academics are forced to seek further employment, a second employment to cover up the expenses,

A: yes, I don't have time to study and write articles or book

I: no time, the workload has been increased and that has to do with the administration personnel that has been sacked and also the nature of the work is changing we have to do more evaluation, we have to do more paper work, technology has not solved problems we have more problems instead [smiling]

A: our work has been, has been bureaucratized, in many senses, a huge bureaucratization of our job; they [politicians and educational policy measures] are increasing our teaching responsibility, they are bureaucratizing our jobs and we don't have really have much time for research, and things like that so this a big problem I agree with you.

I: and the teaching load has been increased either formally, we have to teach eight hours, or because colleagues take pension and then who is going to teach their lessons, their courses when they are compulsory courses? So we share among ourselves, so we teach more hours than we used to teach and that is a lack of time then for research, for thinking, or whatever, going to conferences we cannot go to conferences as far as we used or could go **A:** hm, hm, [consenting]

A: We [the Greek universities] tend to be teaching institutions and not research and teaching institutions as we used to be. There is a certain policy that is trying to separate teaching from research and this is the situation that has already taken place in other countries you know this separation of universities, of teaching and universities of research or the separation of teaching from research there are people who are doing the teaching job and there are people who are doing the research and there is not a communication between them which is in my opinion very crucial; you cannot have good teaching without researching certain issues; and even when you are teaching you if you are a researcher and if you are teaching then you discover questions that you have to bear in mind in your research; so there is a two way, these are two processes which are related, teaching and research, all these are policies are trying to get them apart, to set them apart to have staff who is specialised in teaching and staff who is specialised in research, funded research so I think this is a problem

I: so, somehow the autonomy, so it's not only the Humboldtian university, it is the autonomy of the university which is at stake; I think now we have a movement to more autonomy, universities have to find their own funds, and the same time more dependency, because they have to find these funds they have to find it, otherwise they cannot survive.

A: yes, yes, of course so their autonomy is traditional and also they are given autonomy lets' say in italics, in the sense they are left alone, the universities are left alone to, to work on their terms and set their own goals but these goals have to be negotiated with the government, so they have they must have an agreement with the government on the goals they are going to set, and they are left alone, they are left free lets' say in italics to work as they like so that they have they have attained these goals after lets' say four years,

I: yes,

A: so there is a conditional contract between the state and higher education, and the universities, so their autonomy is in italics in my view and the state has still a very strong role in what the universities are going to do

I: yes, is this direct or indirect effects of the crisis that we have now planning strategies that we have to plan four years

A: yes, four years agreement, yes **I:** four years agreement and [setting] targets of success

A: because the emphasis is also in the outcome, the output.

I: Ok, would you like to add something?

A: There is not something else coming to mind at the moment; of course all these s are big issues we will/could discuss them for a long time, and there is a food for thought, fortunately or unfortunately for us [smiling] you know to see how policies will develop and analysing them and evaluating in the long run is another issue, so ...[pause]

A: The only we can do now at this moment is being a bit more critical about them but we can do that because we are in the universities and this is the big role of the university you know, evaluating I mean analysing, interpreting social issues, which, and this and this function of the university very important function is not necessarily related with what the labour market needs at a certain moment, so I hope I'll be given the chance to continue doing this job in the future [smiling].

I: I hope so too, thank you!

A: Thank you very much [smiling].

Demographic characteristics

Interviewee's age: 46 years old

Gender: woman

Position: Assistant Professor in Education Policy

Working experience: 18 years in education (of which 14 in higher education)

Field of expertise: education policy, comparative education, higher education, and adult learning

Interview details

Protocol interview questions: ECSE & V. Kantzara

Conducted, recorded & transcribed: V. Kantzara

Duration interview: 70 minutes

Place: the office of the interviewee in Athens

Date: 2nd of December 2014

7. Final analytical grid and indicators

Section	Analytical Topics	Indicators
<p>Background context</p>	<p>National Context description – Section A1:</p> <ul style="list-style-type: none"> • Population´s qualification • Social inequalities • Political Cycles • Education Policy 	<ol style="list-style-type: none"> 7. Qualification of the Population 25-64 years of age 8. Employment Rate and Unemployment Rate (25-64 years of age) 9. Gini coefficient of equivalised disposable income; 10. At-risk-of-poverty rate (cut-off point: 60% of median equalized income after social transfers); 11. Child poverty rate. 12. Educational Funding (state/families): Public Expenditure on education (% do PIB) / Family expenditure on education (% do PIB), Private share on educational funding.
	<p>Description of the Educational System – Section A2</p> <ul style="list-style-type: none"> • Educational Diagrams • Public and Private Sectors • Transitions • Numbers • Infrastructures and equipment Sufficiency National covering /Schools Network Distribution of equipment Quality of facilities 	<ol style="list-style-type: none"> 7. Teachers and students numbers (total numbers, from 2000 to the present); 8. Numbers of public and private schools (total numbers, from 2000 to the present); 9. Level of educational offer in terms of vacancies and number of schools (considering the different schooling levels – pre-schooling, primary, secondary, tertiary, vocational and training education) 10. The structure of educational provision: how do transitions occur (since first transition, does it imply tracking, compulsory school guidance, national exam); existing tracking for different education levels, and possibilities of permeability between tracks; 11. Percentage of students by gender; age groups – except on cases where ages are already defined; ethnic minorities, immigrants and descendants of immigrants; regional distribution)

	<p>Processes and Mechanisms of Monitoring and Evaluating the educational system – Section A3</p> <ul style="list-style-type: none"> • International Tests • International Influence • Processes of Assessment • Teachers Recruitment 	<p>12. By different educational levels: enrolment rates; drop-outs rates; retention rates.</p> <p>6. Discuss the use of international tests like TIMMS, PIRLS, PISA,, European Reports and recommendations, in the “domestic” policy making;</p> <p>7. Describe the Educational statistics production/publication: on the regularity of data collection, the main sources, dissemination of results and transparency of the system in your country;</p> <p>8. Describe the processes of assessment of the educational system performance which type and regularity, such as the institutions in charge of monitoring, evaluation and assessment of the school system (examples: national examinations as a mean of system assessment; external or internal assessment of schools, etc.);</p> <p>9. Describe the processes of schools’ autonomy in your country.</p> <p>10. Describe the procedures of teachers recruitment and professionalization; as well as the training of teachers and other educational agents.</p>
<p>Crisis Impacts in Education</p>	<p>Equity: Policies and Achievements – Section B1</p> <ul style="list-style-type: none"> • Equity Evolution • Policies – Access/Success 	<p>15. Percentage of students with schooling social support – organize data by educational level attendance and nature of the institution: public or private.</p> <p>16. Expenditure per student (%);</p>

	<ul style="list-style-type: none"> • Participation in education • School Population Diversity • Student and Families Support – measures • Adults education • Special Education 	<ol style="list-style-type: none"> 17. Pre-schooling enrolment rates (if possible, organize the data by nature of institution: public or private; mean age of attendance, and for those with more than one year enrolment) 18. Participation rates of children with disability (%) 19. Participation rates of students with ethnic minority background, immigrants and descendants of immigrants; 20. Early School Leaving Rate (%) (if possible, by gender and social origin, ethnic minority background, immigrants and descendants of immigrants) 21. Selectivity on tracking and transitions processes; 22. Retention Rates (%) (whenever possible, by school level, gender, age, social origin, ethnic minority background, immigrants and descendants of immigrants); 23. Specific national/political programmes for improving scholar performance (ex in Portugal Territorialização de Políticas Educativas de Intervenção Prioritária (TEIP – Territorialization of Priority Education Policies Intervention), National Reading Plan; Offer and types of Curriculum Enrichment Activities); 24. Population with the upper secondary attainment (%) 25. Population with the tertiary attainment (ISCE 5 A or B) (%) 26. Percentage of population aged 25-64 below secondary attainment (whenever possible, by gender, and social origin, ethnic minority background, immigrants and descendants of immigrants); 27. Percentage of adults within vocational and educational system; 28. Global evolution of PISA results (since 2000 until 2012)
--	---	--

8. Outputs

e) Articles

Luís Capucha; Pedro Estevão; Alexandre Calado; Ana Rita Capucha.

Introduction: symbols matter.

For classical social scientists cultural, social, economic and political phenomena can only be understood in relation to each other. For instance, for Karl Marx (1979) the cultural “superstructure” was a condition for domination and economic exploitation based on social relations in the process of economic production (the infrastructure). Max Weber (1978), in his turn, explained in great detail the relations between religious values present in Protestantism and the emergence of capitalism. Several times misunderstood, he did not propose a causal relationship between Protestantism and capitalism, but he strongly made his point about the interaction between cultural and economic dynamics. Expectations, beliefs, values, social representations, attitudes and symbols integrate all kind of social, economic and political processes. This is a transversal trait in the social sciences, but also in public policies studies, when they focus the perception of public problems, the reasons that make them enter the political agendas and the process of debate and choice between alternative options for action (Dye, 2005).

Despite this perspective, there are cases of specific historically situated socio-economic and political processes in which this multidimensional approach is forgotten. We will argue that the imposition of recent austerity political programs to some European countries also brings up, on a large scale, stigmatizing process similar to those ones described in Erving Goffman’s writings regarding “stigma” (Goffman, 1963). Following this path, we will argue that the attribution of negative cultural traits to persons, groups or societies functions as a mechanism that helps imposing subordination and material constraints to those affected (Bourdieu, 1984).

One case where a symbolical approach brings valuable insights to the understanding of political processes is the imposition of austerity policies in Europe from 2010 onwards, – following the global financial crunch of 2007-8.

We will focus here on a specific instance of stigma: the label of PIGS, a pejorative acronym that groups together Portugal, Italy, Greece and Spain. This acronym was initially bestowed upon these countries by the specialized anglo-saxonic financial press and quickly made its way into the mainstream media. It evokes a series of moral faults that are seen as inherent to these countries and their inhabitants – such as laziness, profligacy, dirtiness and short-sightedness – and being the main root of their economic problems.

We argue in this paper that, as usually with stereotypes, the bad reputation implied by the PIGS label has little or no correspondence in reality as Portugal, Spain, Italy and Greece present very different economic, political and social characteristics; if anything

actually links them, is the fact that all of them experienced a fast process of convergence with current European social patterns until the Euro crisis. Secondly, we argue the PIGS label and the symbolic discrimination implicit in it are just one rhetoric piece of a far-reaching hegemonic narrative aiming, on the short run, at justifying harsh austerity policies in Southern Europe as the only answer to the debt crisis, and, on the long run, at positing the incompatibility between the European social model and economic growth.

In order to illustrate the divergence between the reality and the ideological stereotyping of Southern Europe, we will present and discuss the evolution of four Southern European countries – Portugal, Spain, Italy and Greece – and five Central and Northern European countries – Denmark, Germany, Sweden, France and the United Kingdom on a series of indicators. These indicators will pertain to five fields: economic performance (GDP per capita and GDP per hours worked); education (qualification levels of the population; PISA results on reading and mathematical competences); social policies (social spending as percentage of GDP and GINI index); and health (public expenditure on health as percentage of GDP, mortality rates and life expectancy at birth). When possible, data on the US will also be presented to provide American readers with a point of reference.

The PIGS stereotype

The stigmatization of the “South” at the eyes of other Europeans is hardly news. One can, for instance, look the renowned tourism corporation “Club Méditerranée” (the “Mediterranean Club”), founded in 1950. Despite the fact that its operations nowadays spread from Switzerland to China and the United States, its brand still relies on a deeply ingrained view of Southern Europe as mainly a space of leisure.

Yet the debt crisis that hit the Eurozone in the aftermath of the 2007-8 global financial crash seems to have given a new vigor to it. One of the most conspicuous examples was the bestowing by the “Financial Times” of the acronym “PIGS” on four Southern European Countries - Portugal, Italy, Greece and Spain. The pun on the initials of these countries was all but innocent. It played on the traditional image of the pig as an archetypal representation of series of moral defects - such as laziness, profligacy, dirtiness or short-sightedness - to foster a moral explanation for the fact that the debt crisis hit these countries earlier and harder.

According to this explanation, PIGS were not in dire economical straits because to far-reaching scale of the 2007-8 global financial crash or to the problems in the institution architecture of the Euro and the model of economic integration it was based on, but exclusively due to their own moral and political faults. Southern European countries would thus have lower productivity levels because their workers were lazy and overprotected by labour rights; rising public debt levels of these countries was directly attributed to supposedly overgenerous social policies; and the persistence of gaps in key economic and social performance indicators after decades benefitting from European

funds were a clear testimony of their inability to rule themselves. In sum, Southern European peoples were living clearly above their means and should not expect Central and Northern Europeans to pay their bills indefinitely (Blyth, 2013).

The PIGS acronym quickly spread from the anglo-saxonic financial media to mainstream media. For instance, “The International New York Times” of November, 29, 2013 associated an image of a donkey in an article about Portugal titled “In Portugal, a beast of burden lives on subsidies” and accompanied by phrases like “Hard times for a small (and fuzzy) group of Europeans”, suggesting an analogy between the situation of Portuguese donkeys – an endangered species whose protection has relied heavily on European funding and environmental legislation – and that of the Portuguese people. At the same time, the British Newspaper “Daily Telegraph” published an extended series of photos of Spanish sleeping the “siesta”, as if sleeping was a symbol of their idiosyncrasy. The label became so ingrained that even some leading social sciences scholars began to use it. One can hardly disguise some surprise at seeing someone like Goran Therborn (2013) using the acronym PIGS and taking its sense for granted.

Of course, reality is seldom relevant in stereotyping. Little attention is usually drawn to the fact that the social spending levels of Southern Europe are actually lower than in “Continental” and Northern countries; or that in Portugal, for instance, individuals work in average 3,1 hours per week more than in Germany – despite earning in average less than half of annual salary of their German counterparts. Before dealing with the uses of the PIGS label, it is thus necessary to counter the stereotype with empirical data. In the following section, we will expose some facts regarding the evolution of Southern Europe in recent decades. In order to do so, we will compare Portugal, Spain, Italy and Greece with a set of other EU member-states and with the USA regarding some key economic and social indicators.

Southern European countries: a diverse and convergent reality

Since joining the European Economic Community (EEC) Portugal, Spain, Italy, and Greece (Italy is a member since the beginning in 1957 and the remaining countries since the mid-1980s), Southern European countries have been engaged in a process of profound transformation of their institutions and their social and economic structures.

Departing from lower economic levels of development, they were able to promote intense processes of transformation in their social, productive, and family structures, in their political and economic institutions, in their systems of values, in their interests and patterns of relationship between actors, in policy-making and governance models resulting from belonging to “Europe” or even better, from the imperative of “being European” - a process that has been aptly called “Europeanization” (Featherstone and Radaeli, 2003). Such changes have been reflected on the convergence these countries have shown with older EU members in several key economic and social indicators.

Economy tends to be one of the most stressed fields, both in the political arena, as well as in the media, scientific research and citizens' everyday concerns. The adhesion to the European Union was expected to promote the modernization of the adhering countries. This was by large a fulfilled objective. Figures 1 and 2 show the relative growth of the Gross Domestic Product per Capita in a series of European countries (both Southern and Northern) and in the US. Setting 1975 as the baseline (Figure 1), we can begin to discern both the heterogeneity of situations in Southern Europe and their general convergence trend regarding the Northern counterparts. Indeed, one struggles to distinguish between Southern and Northern Europe trajectories in this regard. If anything, some of the greatest growth rates until the onset of the current crisis actually take place in Southern Europe.

(Insert figure 1 here)

Portugal features the highest GDP per capita growth rates from 1995 onwards, with GDP per capita in 2010 having grown to 8,1 times its size in 1975. Spain too shows a remarkable growth, with GDP per capita in 2010 being 6,8 times higher than in 1975 – greater than even Germany boasts, whose GDP per capita in 2010 was about 6,4 times higher than in 1975. Italy had a slightly inferior performance, with GDP per capita in 2010 being 6,1 times bigger than in 1975. Still, this was not considerable lower than the growth rates in the Denmark (6,5 times), the UK or the US (both at 6,4 times) and was actually higher than those France (6,0). Amongst Southern European countries, only Greece lagged a bit behind– with GDP per capita in 2010 being 5,6 times its size in 1975 – and even so, being at the same level as in Sweden.

(Insert figure 2 here)

Yet this convergence trend seems to have been stopped on its tracks by the crisis. Taking now 2007 as the baseline year, figure 2 illustrates emphatically how the impact of the crisis and the austerity policies was particularly harsh on Southern Europe. Indeed, one can clearly see a gap between Southern and Northern Europe appearing from 2010 onwards. By 2012, Germany, Denmark, France and Sweden all had a GDP per capita that was over 10% higher than in 2007 – the former two at respectively 18,1% and 13,6%, and the latter two at 11,6%. Meanwhile, Portugal, Italy and Spain were all below the 10% growth threshold with GDP per capita in 2012 being respectively 6,8%, 6,7% and 1,1% higher than in 2007. The case of Greece case was particularly dramatic, with GDP per capita in 2012 being 7,7% inferior of the one in 2007 and still on freefall.

Unlike what is suggested by the “sun and siesta” trope, productivity in Southern Europe also rose significantly in the past three decades. It was actually a Southern European country that led the pack in our sample in this regard, with GDP per hour worked in 2010 in Portugal being 83,7% higher than in 1986, ahead even of Germany and Sweden (57,7%

apiece). Greece has also shown a considerable growth in this regard at 46,2%, right behind France (48,3%) and ahead of Denmark (45,7%). Only Spain (35,1%) and Italy (at 27,5%) actually fall behind their Central and Northern counterparts in this regard.

(Insert figure 3 here)

What is more striking, the four Southern European countries show a radically different behavior among themselves regarding productivity evolution in the crisis years. Spain and Portugal top growth levels in our sample in this period, with GDP per hour worked in 2012 being, respectively, 10,5% and 7,7% higher than in 2007. In fact, Spain was the only country in our sample that boasted a continuous growth in this indicator throughout the 2007-2012 period, as would Portugal if the baseline had been set in 2008 instead. By comparison, Sweden, Germany, France and Denmark show near stagnation in this regard, with GDP per hour worked in 2012 being respectively 1,6%, 1,4%, 1,0% and 0,9% higher than in 2007. The bottom two countries in this regard were Italy and Greece – two Southern European countries - where GDP per hour worked actually fell by 1,3% e 5,6% respectively between 2007 and 2009.

(Insert figure 4 here)

Economic specialization through restructuration, which occurred in all countries under European influence (and supported by structural funds), is undoubtedly connected to the evolution and sound progress of productivity. Anyway, it is still a problem present in all Southern countries. Besides economic specialization equally important are such factors as technological modernization, work organization, the functioning of the markets, the funding system for risk capital, the functioning of the systems of justice and the “externalities”. We will focus here on yet another decisive factor hampering productivity: the lack of qualifications (Ball, 2008).

(Insert figure 5 here)

In fact, Southern European countries entered the information age with a disadvantage in the qualification structure of the active population. In 1992, 57 percent of the Greek population had only attained the primary education level (low secondary in some systems). The same applied to 59 percent of the Italian, to 68 percent of the Spanish and to the impressive number of 78 percent of the Portuguese. Of the remaining countries represented in figure 5, in the same year, the UK was the one closer to these numbers with 48 percent.

Almost ten years later, Portugal remained in the same situation, whereas Spain, Greece and Italy were showing clear signs of recovery. In 2011 Portugal showed a reduction of 17 percentage points (pp), while Spain and Greece increased in 26 pp and Italy 23 pp. The proportional growth rate of people with a secondary or tertiary education level

improved in all of Europe, as well as in the United States, with a close proximity of the Southern European countries, even though they still show relevant deficits in this area. The same convergence trend can be seen in the results of PISA, the OECD survey that measure literacy competences in individuals aged 15. PISA results are therefore used as an indicator of efficiency of the system concerning the quality of learning. The effort done by the Southern European countries can be derived from these results. Figures 6 and 7 show the results on reading and mathematics score scales.

(Insert figures 6 e 7 here)

In the case of reading there was a rapprochement of all the countries. Some of the Southern European countries, namely Portugal, show an impressive progress, while Sweden shows a declining trajectory. The same could be verified in mathematics. Even though there is a convergence, there is also a higher dispersion and inequality in the results. It must be highlighted that Portugal and Spain are closer to the other countries in a context where the South consistently occupies rear positions. Europe, as a whole, is close to the OECD average.

What happened in education is also evident, perhaps even more clearly, in the field of social policies. Although the Southern European Countries had got to built up their social protection policies in a countercyclical context (the opposite of what happened, in general terms, in the post-war Europe and USA) the increase in social protection expenditures as a percentage of GDP was, and still remains, a reality. Nevertheless, Southern Europe maintains an expenditure level inferior to the European Union average. This goes together, curiously, with the growing presence of a neoliberal discourse arguing for the reduction of the state in the economy in most of the developed countries (Emmenegger, Haussermann, Palier and Seeleib-Keiser, 2012).

(Insert figure 8 here)

In 1980 the USA spent only 13,2% of the GDP in social protection expenditure, a lower number than the OECD average (15,5%) and much lower than European countries such as Denmark (24,8%), France (20,8%), Germany (22,2%) or Sweden (27,1). Only the UK (16,5%) was close to the USA, yet still above OECD average. Of the four Southern European countries only Italy (18%) and Spain (15,5%) were close to these figures, whereas Portugal and Greece (9,9% and 10,3%, respectively) were far from the levels of social spending of all the others

Two decades later, at 2000 the OECD average was 18,9%, almost the same as the UK (18,6%) and a little bit above the USA (14,5%). Greece, Portugal and Spain (19,3%, 18,9% and 20,2%) were closer to each other and to the other European countries considered - 26,4% for Denmark, 28,6 for France, 26,6% for Germany and 28,4 for Sweden. Italy was in the middle between North and South, with 23,1%. In 2005 the evolution of this

indicator showed an increase from all, except Spain, with the relative positions of investment being maintained.

In 2010 Germany and Sweden registered a small decrease and the USA a sound increase (to 19,4%) in social expenditure. Greece and Portugal maintained their approach to the leading group. This was formed, in 2013, by France (33,1%), Denmark (30,8%), Sweden (28,6%) and Italy (28,4%). The group formed by Spain (27,4%), Portugal (26,4%) and Germany (26,1%) wasn't far behind. At the bottom end appears the UK (23,7%), Greece, strongly affected by the crisis (22,0%), and the USA (20,0%).

Population ageing, with its consequent increase in expenditure with pensions and health, determines this growth that seems to be independent of the predominant ideological discourses in each country. Not only more people benefits from the pensions and the health services, but also these were improved significantly. The growth of the values of pensions and the introduction of social assistance measures for the elderly are part of these policies, with strong impacts in the poverty rate among old people.

The South was not expending above the other Europeans, but their trajectory was one of convergence. To meet this status, between 1980 and 2013 the growth of the social expenditure in percentage of GDP improved 166,5% in Portugal, 113,5% in Greece and 77% in Spain (see Figure 10). Anyway France, the UK and the USA did also increased significantly their social expenses, respectively in 58%, 44,1% and 51,8%. In the other cases, where the starting point was already high, the increases were smaller (24,1%, 18,4% and 5,6%), respectively in Denmark, Germany and Sweden.

Social expenditures levels in Portugal, Italy, Greece and Spain do not differ from (and in some cases are even somewhat lower than) other European Countries. It could be pointed at that these levels have grown faster than their counterparts in the past 20 years; however, one should take into account that Portugal, Spain and Greece started from very low levels in the first place. Thus, the state profligacy accusation that is implicit in the PIGS stereotype can hardly be seen as warranted.

One must stress that, even though there is an increase in social expenditure, the inequalities in distribution and poverty have grown (Therborn, 2006; Lansley, 2011; Dorling, 2011), with only a few exceptions, notably in some South European countries (Nolan and Whelan, 2011).

The Gini index is, among others, one of the most common indicators used in the analysis of inequality in the distribution of income.

(Insert figure 9 here)

Turning now to health indicators, we look at the evolution of public expenditure per capita on health - eschewing the question of total expenditure, since contribution of families is an important share, even in Europe, where its weight varies a lot. Again, data about the Southern European countries structures and trajectories is coherent in relation to all the other aspects we have been analyzing.

Within Europe the main tendency is a convergence one. Indeed, in 1980, Portugal (5,1% of GDP per head), Spain (5,3%), Greece (5,9%) and the UK (5,6%) formed a group at the bottom. Italy and France were in an intermediate position, with respectively 7,7% and 7% of GDP per capita affected to public expenses in health. The other four countries were above this level, all near 9%. The trajectory up to 2011 is one of growth in all cases, but the ones that started from the bottom made an emphatic effort to close the gap (maximum of 11,6% in France and the minimum of 9,1% in Greece).

One should point out that the case of the USA is a completely singularity in this context. Although starting from a situation very similar to countries like Denmark, Germany or Sweden in 1980 (around 9%), public expenditure in health in the US grew at an extremely fast pace in the following three decades as almost the double of these countries hitting at 17,7% in 2011.

(Insert figure 10 here)

An interesting fact when analyzing health data is that the registered differences in public expenditure are not reflected in the outcome indicators. The Southern European countries showed similar results, and in some cases outdid their European peers in terms of efficiency. This can be illustrated, for instance, by the evolution of child mortality rate and of average life expectancy at birth.

Average life expectancy at birth varies between 80,8 in Portugal, Greece or Germany and numbers close to 82 years in France, Italy and Spain. In all countries the situation is better than in the USA (76,5 years).

(Insert table 1 here)

Among the Southern European countries, Greece, Spain and Italy started from a more advantaged situation than Portugal, but Portugal “gained” 9,4 years between 1980 and 2011. In this matter, one cannot distinguish between European “regions”, with Spain gaining 7 years, Italy 8,7 years and Greece 5,5.

Concerning child mortality rate, the evolution of Portugal is quite striking with a decrease of 37,9 deceased children before 1 year of age in 1000 live births to only 3,1 from 1974 to 2011, the lowest number of all the countries presented in Figure 15.

In a framework of overall progress in all countries, Portugal, departing from a clearly worse situation than the other European countries (with the exception of Germany) and the USA in 1974, is the most remarkable case in the South, obtaining similar numbers to its peers and clearly better numbers than the USA in 2011.

(Insert figure 11 here)

We believe these data demonstrate the significant differences between Southern European countries and their overall convergence trend toward Northern and Central. However, they also show the first signs that this trend be reversing, not because of some “moral defect” of their population but as a result of the debt crisis and the austerity policies devised to address it (Krugman, 2013). The impacts of the crisis – in which context the acronym “PIGS” appeared - should be carefully monitored.

Is “Southern Europe” more than South?

Deconstructing the stereotype of the PIGS through the use of empirical data is only one part of the task. On a scientific level, a case could be made for considering Southern Europe as a generally homogeneous entity for analytical purposes. The question would then be twofold. Does such consideration actually bring to fore some analytical gains? Or is it just reifying unchecked assumptions due the lack of detailed knowledge on the reality of these countries?

The idea of a specific Southern social, political and economic European model is deeply ingrained also in scientific literature. In refining his famous typology of welfare states, Esping-Anderson (1990) takes pains to stress a supposed specificity of Southern Europe, which should be seen as a “less developed” case of the Continental (or conservative) model.

Starting from Esping-Andersen’s typology, some authors suggest that Portugal, Spain, Italy and Greece form a distinct welfare state model in Southern Europe (Ferrera, Hemrijck and Rhodes, 2000). This model is usually characterized by the following common traits: a history marked by dictatorships that lasted until recently; a less generous and sustained social protection system; relations between state, market and families characterized by the strong role of families in the promotion of social protection and underdeveloped state institutions; more extensive poverty; a larger presence of informal economy; segmented and low-skilled labor markets; a policy mix of policies based on social insurance and categorical/corporate logics and others of Beveridgian orientation (such as health), among other common traits.

However we stand instead on the side of authors such as Therborn (2013) that argue that this geographical tagging has little correspondence to the reality of these societies and economies. In some fields they range close to Central Europe – for example, the existence of “insiders” and “outsiders” in protection systems typical of corporatism. In other fields, like the ones that have been presented previously they are changing fast and approaching European patterns. But, above all, and in spite of the common trajectories of convergence, they are very different from each other.

Indeed the characteristics usually put forward to justify such grouping do not stand up to close scrutiny. Historically, it is true that all of these four countries experienced fascist dictatorships in the 20th Century. But so did most of the current members of the European Union. Fascist dictatorships were established in all but a handful of European

countries from the 1920s to 1940s, either through domestic movements or as puppet regimes sustained by Axis military occupation during World War II.

The duration of these experiences is also very diverse. Italian fascism was over by the end of the War – at the same time as the German nazi regime - while the authoritarian grip on Greece was intermittent for most of the third quarter of the 20th century. In fact, only on the two Iberian countries, Portugal and Spain, can we see a dictatorships lasting continuously from the 1930s to the mid-1970s.

Political institutions also differ significantly. For instance, regionalization in Italy and Spain are one of the key developments of their respective democratization processes. Regions in Spain are today a central feature of political life, with each of the 17 “Comunidades Autonomas” having its own statute, elected government, regional parliament and considerable autonomy on fiscal matters and on education, social and cultural policy. Likewise, Italian “Regioni” boasts significant political and fiscal autonomy and full-fledged legislative and executive bodies. Regional devolution is, however, much more recent and incipient in Greece, where the “Peripherii” were, until the late 1990s, mere regional branches of central government and whose governors and councils only began to actually be elected by popular vote in 2011. Portugal makes for an even sharper contrast with Italy and Spain. Although its two Atlantic archipelagos – Azores and Madeira - do have “Governos Regionais” and local parliaments with considerable powers, regions as such have no formal existence in the Portuguese mainland.

Portugal also sets itself apart regarding employment structure (Pedroso, 2013). Until the crisis, Portugal boasted very high rates of employment and of women employment in full time jobs – in fact, Portugal ranks first in Europe in this variable (Tavora, 2012). The unemployment rates were also traditionally low, until the crisis of 2003 and mainly 2008, while Spain has always been at the top of Europe unemployment rates; and in all the southern Europe women are largely kept outside the labour market, except for the new generations (Moreno, 2013). Furthermore, the phenomena of the working poor distinguishes Portugal from the others, where the dualization between insiders and outsiders is greater.

Family structures and their role in welfare systems have been emphasized in all the researchers that argued in favor of the existence of a “Southern Model” of welfare. But, on one hand, Portugal has shown a deep difference regarding the others from South and, on the other hand, recent research (Moreno and Mari-Klose, 2013) has been showing that also in family structures the South is changing quickly, becoming more and more European-like.

If there is indeed something unequivocally shared by these countries – aside from the Mediterranean climate that predominates on large tracts of their territories – it is the convergence path with Central and Northern European countries that they were following until the debt crisis – and even that is in jeopardy, because of the detrimental effects of austerity policies imposed on them since.

In sum, as the both quantitative and qualitative indicators show, Southern European countries are too different from each other for any ideal-typical grouping of them to have any serious analytical value.

The PIGS stereotype

Climate and the proximity of the Mediterranean Sea is not enough to make a welfare capitalism model, and even less to put a spell on a set of countries that, as we have been trying to show, are very far from the image that has been promoted to devalue them. In face of this, it is hard to see on the PIGS label other thing than a racist tag targeting Southern Europeans.

But what is the purpose of spreading such insulting label grouping the different Southern European Countries? Which ideological agenda implicit in it?

To answer this question, it is important to consider that, almost at the same time, another acronym was following a similar path from specialized to mainstream media and then spilling over to scientific literature: BRICS. This was a label that was applied to the so called emergent economies of Brazil, Russia, India, China and South Africa, and one that called for a symbolic connotation very different from the one tied to the acronym PIGS. Where the PIGS acronym invokes moral faults, the BRICS label is semantically associated to moral (and physical) virtues. A pig can be seen representing laziness, profligacy and dirtiness, while a wall of bricks can symbolically stand for as discipline, reliability and strength.

Now, the BRICS are giants compared to the Southern European Countries in terms of population and territory. They are still very far away from Europe both in terms of productivity and, mainly, in terms of social quality. But they are growing fast and becoming big global economic potencies, even able to challenge previous hegemony in the world system (Lachmann, 2010). They are also starting to set in place some rudimentary social policies systems (Gough et al, 2004; Haggart and Kaufman, 2008), because inequalities are putting in danger their internal balances. But the news about them are rarely focused on these initiatives. The fast growing and modernizing achievements in economy is what makes of them “strong” “disciplined” countries and “reliable” partners. It is what makes them “bricks”.

But is there a link between the stigmatization campaign against Southern Europe and the glorification of the BRICS? Answering this question will require further research. But we do believe that acronyms like PIGS and BRICS are part of a wider moral narrative. In this narrative, Southern European hardships are fully deserved and can be attributed to the presence of an unsustainable social state and to labor rights, which are bad for the economic performance. By contrast, BRICS are succeeding because there are no labor market regulations nor high salaries discouraging capital attraction; there are no social policies, distribution mechanisms nor welfare states, and this allows markets to develop free of any burden or constrain.

This moral tale is essential, on the short term, to justify the imposition of unprecedented austerity measures in Southern European countries. By framing the debt problem in terms of national moral faults, it conveniently masks the central role that deregulation of the financial markets (Crouch, 2011) and growing worldwide social and economic inequalities (Wilkinson and Pickett, 2009; Dorling, 2011) played on the 2007-8 global financial crash. It also drives attention away from the dysfunctional nature of the institutional architecture of the Euro (Beck, 2013; Rodrigues, 2013), and the fact that the EU itself had encouraged a Keynesian-style expansionist answer to the crisis until mid-2010 (Pedroso, 2013).

It is indeed easier to impose one size-fits-all solutions on Southern European countries if they are perceived as essentially homogeneous. Formal approaches may be different: in the case of Greece and subsequently of Portugal, through agreements signed with the troika, comprised by the IMF, the Central European Bank and the European Commission; in the case of Spain and Italy through the approval of identical programs without the formality of the agreements. But the measures are remarkably similar: drastic cuts in public education and health services, extended privatization programs, unchecked aid to the financial system, dismantling of labor protection and heavy reductions in pensions and other social benefits, including the ones for poorer populations. The outcomes of the austerity programs, are known: exponential growth of unemployment, negative or close to negative growth, brutal increase of the tax burden imposed on tax payers, a big decline in income from salaries and pensions, are some of the consequences visible so far.

But the PIGS-BRICS moral tale seems to serve a much broader purpose than just punishing the Portuguese, the Spanish, the Italians and the Greeks for their supposed moral faults. It is also presented as a warning tale for all Europeans. The debate around the future of social Europe is a key to understand the dissemination of such kind of anathema like the one that is affecting Southern Europe. The movement towards dismantling the welfare state faces two essential legitimation problems for the EU: on the one hand, wide-range social policies have been for generations a crucial mainstay for the political stability of Northern and Central European countries – and a heavy symbolic investment is needed for overcoming the resistance of these countries' citizens to part with such policies (Svallfors, 2010). On the other hand, the European social model plays paramount role in the unique appeal of the European Union on the populations (Featherstone and Radaeli, 2003) of its new and prospective members in Eastern Europe – and doing away with that model destroys most of that appeal. The PIGS-BRIC narrative is thus part of a symbolic apparatus that masks such contradictions and justifies the regression of social and labor rights in Central and Northern Europe (Hemereijck, 2013; Emmenegger et al. 2012) and ensuring a new cheap and submissive labor force in Eastern Europe.

In short, the PIGS-BRICS is a moral tale with racist overtones, and should be seen as part of a rhetoric ploy whose goal is to posit social rights and economic performance as

incompatible at the eyes of the public. Europeans are to be convinced that their future is at stake if they do not accept the agenda of so-called “structural reforms” based on the twin movements of retrenchment and privatization that is being imposed throughout Europe. Punishing the South calling on racist stereotypes such as those implied PIGS may be a way to prevent the advent of aspirations in Eastern Europe and in the rest of the world where there is economic expansion and wealth creation, to be accumulated by a few through the mechanisms of speculative economy.

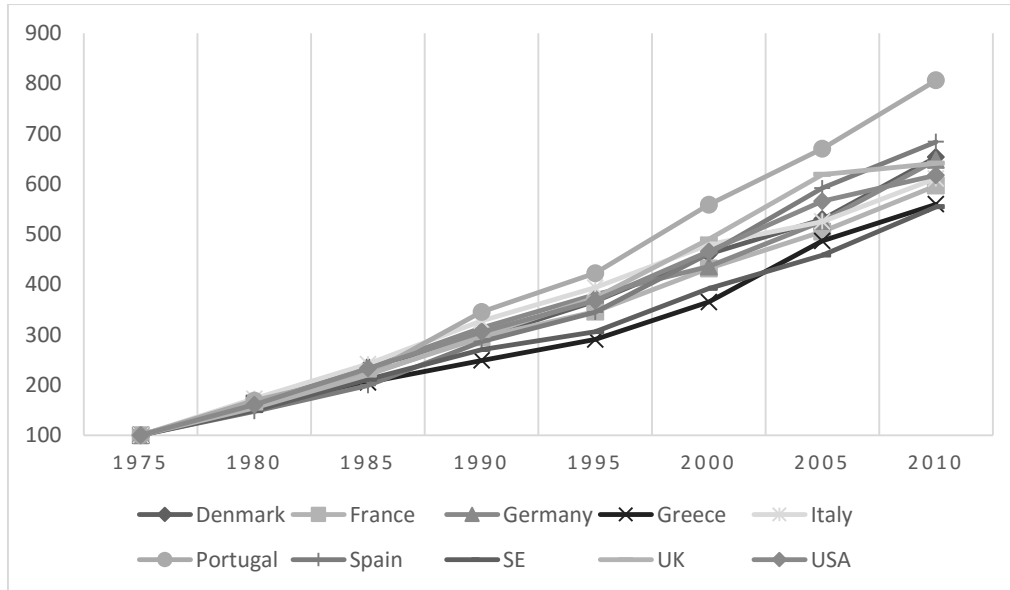
Bibliography

- Ball SJ (2008) *The education debate*. Bristol: The Polity Press.
- Beck U (2013) *German Europe*. Cambridge: Polity Press.
- Blyth M (2013) *Austerity: The History of a Dangerous Idea*. Oxford: Oxford University Press.
- Bourdieu, P (1984) *A Social Critique of the Judgment of Taste*. Cambridge MA: Harvard University Press.
- Crouch C (2011) *The Strange Non-Death of Neoliberalism*. Cambridge: Polity Press.
- Dorling D (2011) *Injustice. Why social inequality persists*. Bristol: The Polity Press.
- Dye, TR (2005) *Understanding public policy*. Boston: Pearson Education Inc.
- Emmenegger P, Hausermann S, Palier B, Seeleib-Kaiser M (eds.) (2012) *The age of dualization*. Oxford: Oxford University Press.
- Esping-Andersen G (1990) *The three worlds of welfare capitalism*. Cambridge: Polity Press.
- Featherstone K, Radaeli CM (eds.) (2003) *The Politics of Europeanization*. Oxford: Oxford University Press.
- Ferrera M, Hemerijck A, Rhodes M (2000) *The future of social Europe: Recasting Work and Welfare in the New Economy*. Oeiras: Celta Editora.
- Goffman, Erving (1963) *Stigma: Notes on the Management of Spoiled Identity*. New Jersey: Prentice-Hall.
- Gough I et al. (2004) *Insecurity and Welfare Regimes in Asia, Africa and Latin America*. Cambridge: Cambridge University Press.
- Haggard S, Kaufman RR (2008) *Development, Democracy, and Welfare States*. Princeton and Oxford: Princeton University Press.
- Hemerijck A (2013) *Changing Welfare States*. Oxford: Oxford University Press.
- Krugman P (2013) *End this Depression Now!*. New York: Melrose Road Partners.
- Lachmann R (2010) *States and Power*. Cambridge: Polity Press.
- Lansley S (2011) *The Cost of Inequality*. London: Gibson Square.
- Marx K (1979) [1859] *A Contribution to the Critique of Political Economy*. New York: International Publishers.
- Moreno L, Pau MK (2013) Youth, family change and welfare arrangements: Is the South still so different?. *European Societies* 15 (4): 493-513.

- Nolan B, Whelan CT (2011) *Poverty and deprivation in Europe*. Oxford: Oxford University Press.
- Pedroso P (2013) *Portugal in International Crisis: The impact of austerity in economy, social model and state functions*. Report prepared in September 2013 for the Friedrich Erbert Stiftung project "Social Cohesion and the State in Times of Austerity".
- Rodrigues MJ (2013) *Europe is Still Possible: Political Adventures in the 21st century*. Bloomington: Xlibris.
- Tavora I (2012) The southern European social model: familialism and the high rates of female employment in Portugal. *Journal of European Social Policy* 22 (1): 63-76.
- Stiglitz J (2013) *The price of inequality*. London: Penguin Books.
- Svallfors S (2010) Public attitudes. In Castles FC, Leibfried S, Lewis J, Obinger H, Pierson C (eds.) *The Oxford Handbook of the Welfare State*. Oxford: Oxford University Press, 241-251
- Therborn G (2006) *Inequalities of the World: New Theoretical Frameworks, Multiple Empirical Approaches*. London: Verso.
- Therborn G (2013) Where the PIGS? Still a Southern European Welfare Regime?. *European Societies* 15 (4): 471-474.
- Weber M (1978) [1970] *The Protestant Ethic and the Spirit of Capitalism*. London: George Allen & Unwin Ltd.
- Wilkinson R, Pickett K (2009) *The Spirit Level. Why Equality is Better for Everyone*. London: Penguin Books.

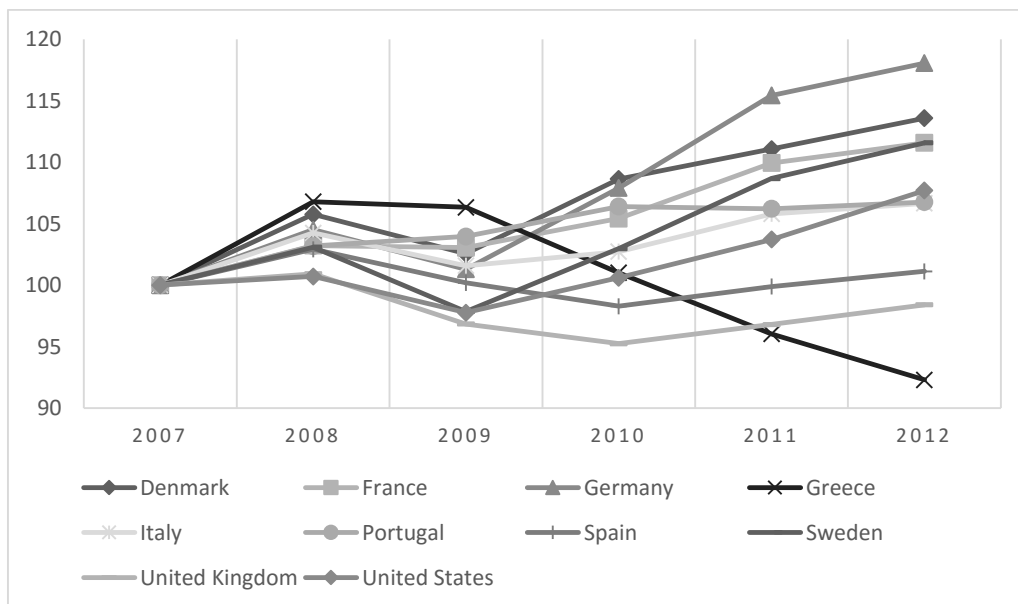
Figures

Figure 1 - GDP per Capita, US Dollar, constant prices, 2000 PPPs, 1975=100



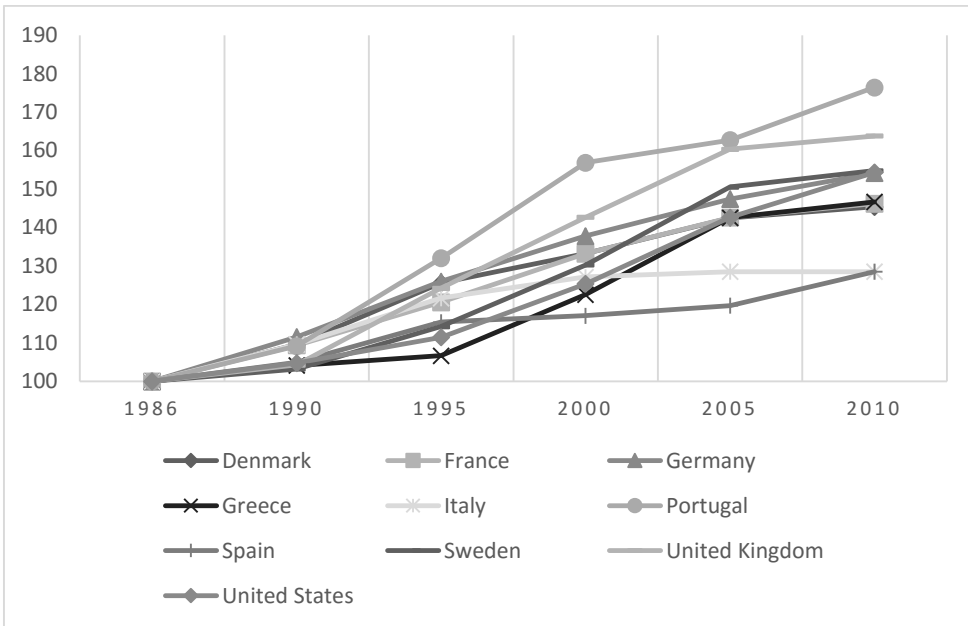
Source: National Accounts Data, OECD.Stat 2013.

Figure 2: GDP per Capita, US Dollar, constant prices, 2000 PPPs, 2007=100



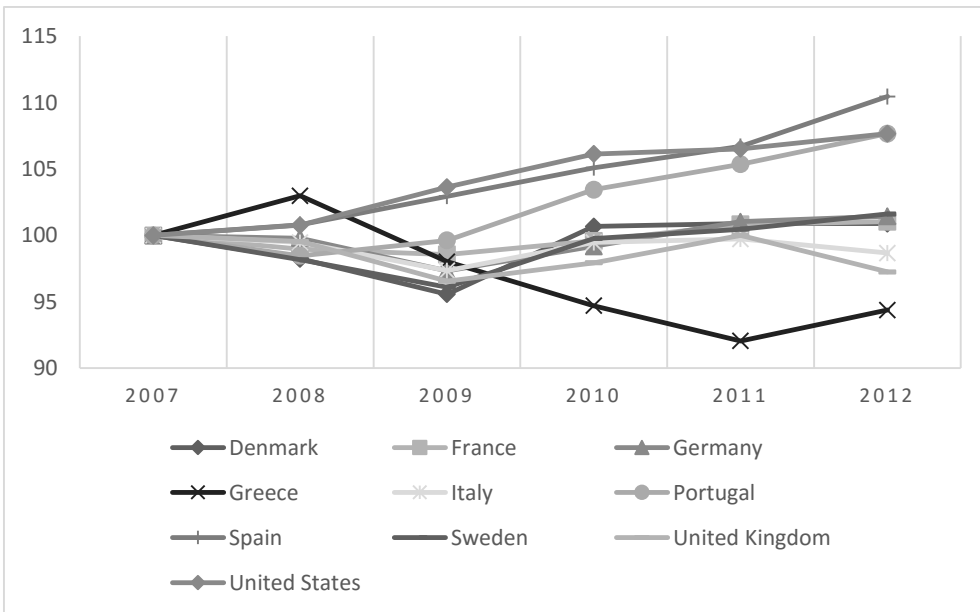
Source: National Accounts data, OECD.Stat 2013.

Figure 3: CDP per hour worked, US dollar, constant prices, 2005 PPPs, 1986=100



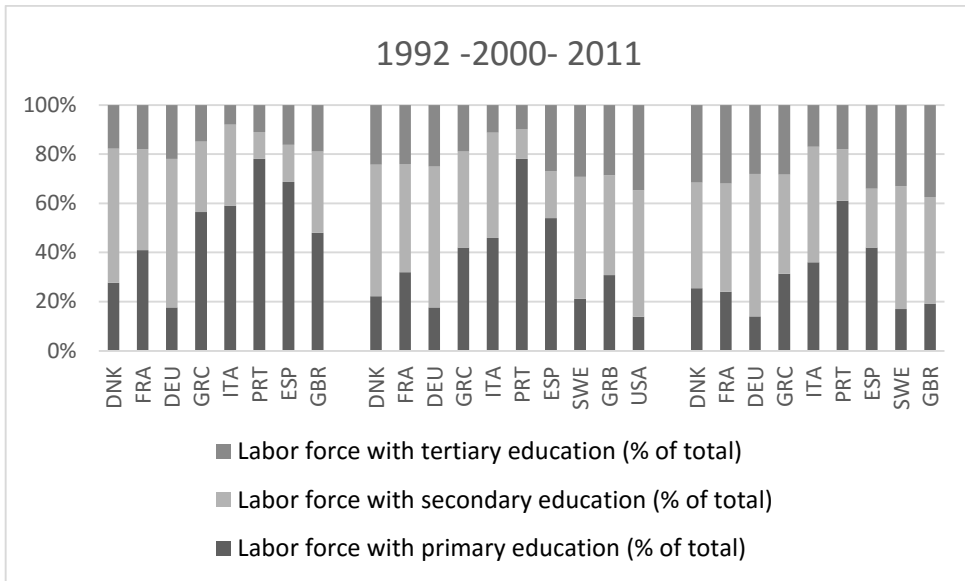
Source: Productivity data, OECD.Stat 2013.

Figure 4: GDP per hour worked, US dollar, constant prices, 2005 PPPs, 2007=100



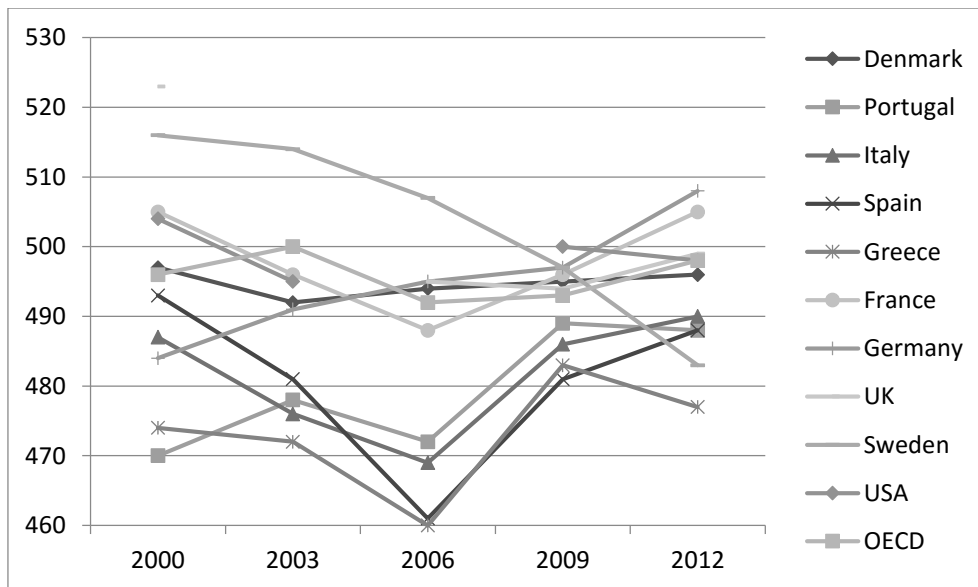
Source: Productivity Data, OECD.Stat 2013.

Figure 5: Labor Force, According to the levels of education, 1992- 2011



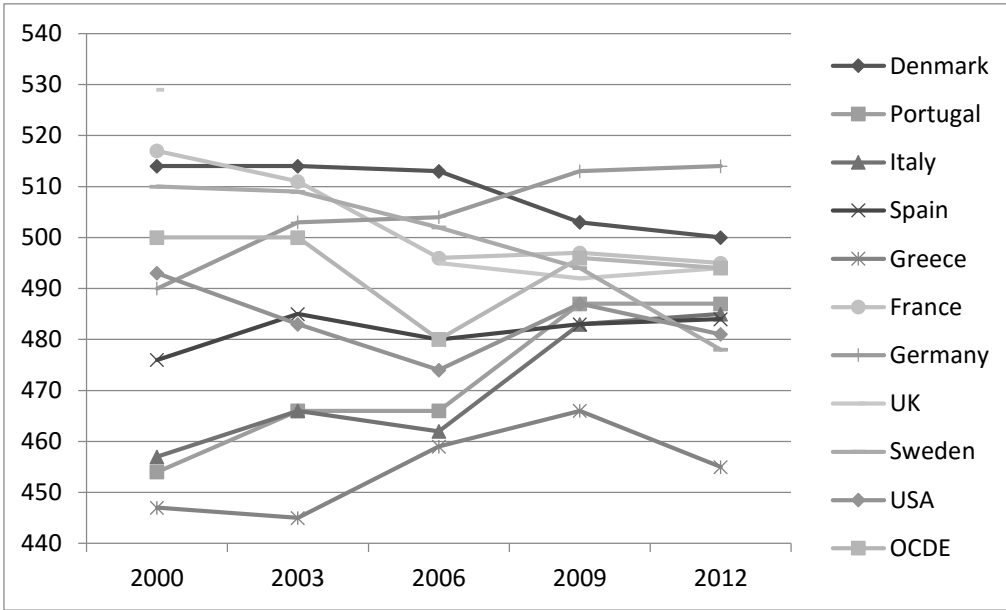
Source: World Development Indicators, World Bank 2013.

Figure 6: PISA results: reading



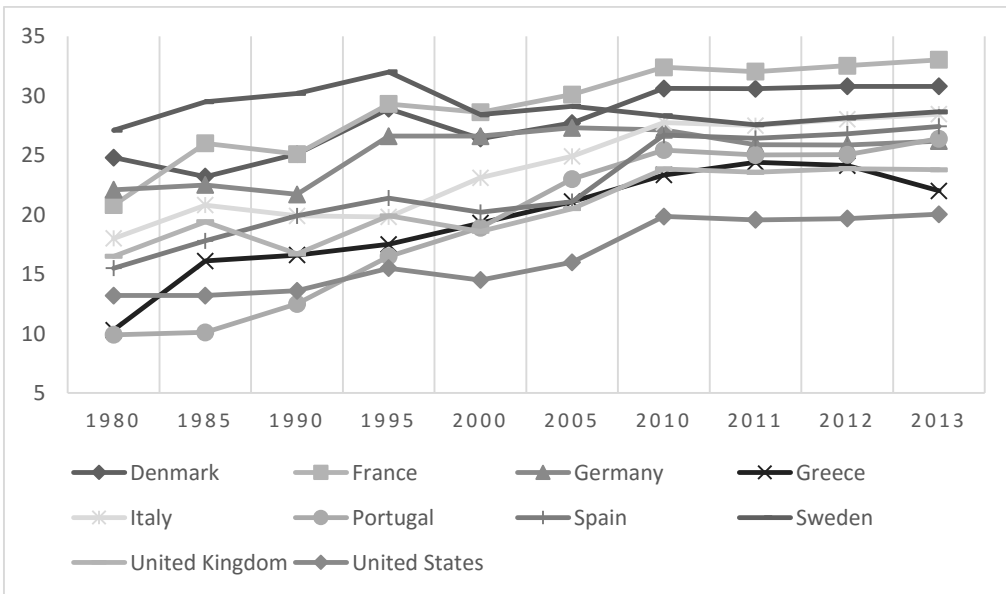
Source: PISA 2000-2012, OECD 2013.

Figure 7: PISA results: mathematics



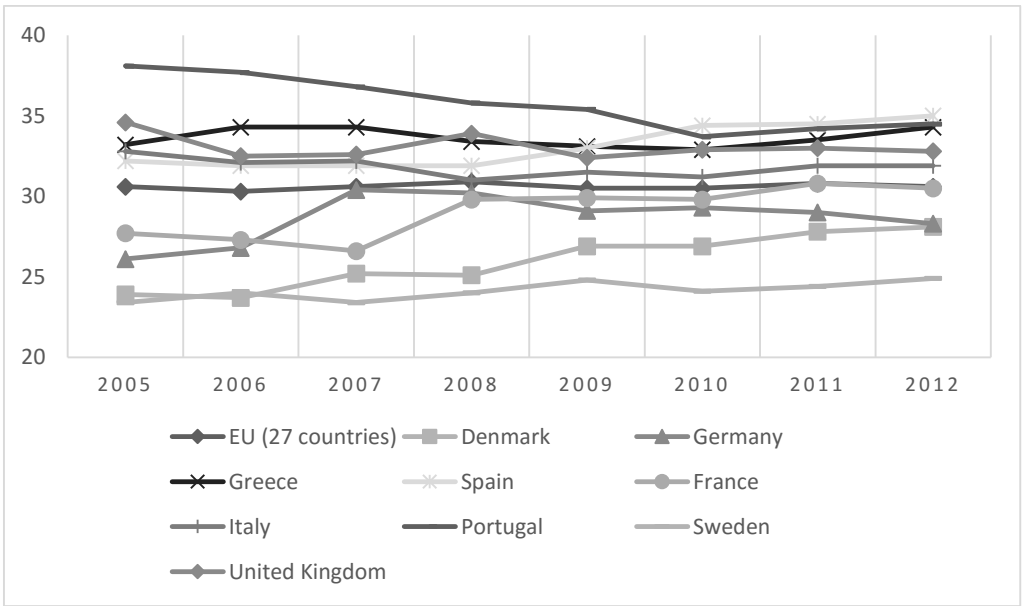
Source: PISA 2000-2012, OECD 2013.

Figure 8: Total Public Social Expenditure in Percentage of GDP



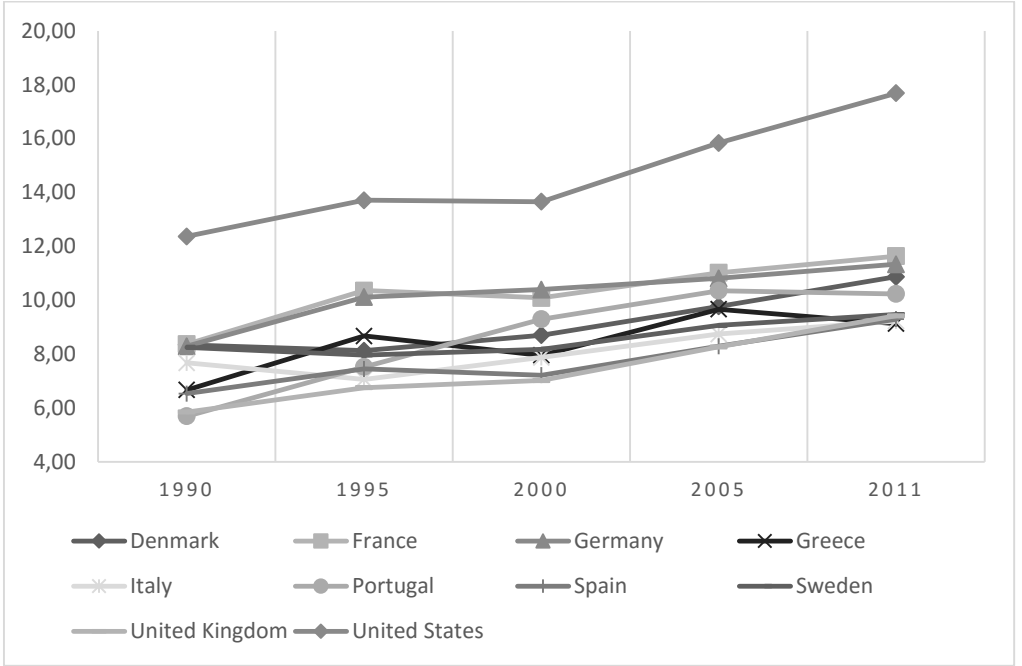
Source: Social Protection and Well-Being data, OECD.Stat 2013.

Figure 9: Gini at disposable income, post taxes and transfers



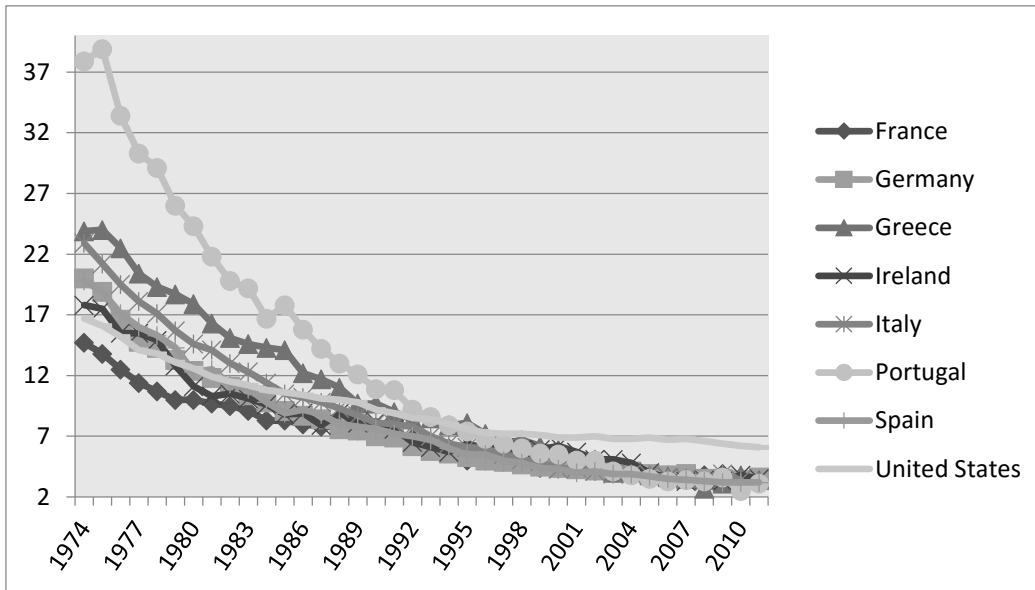
Source: SILC, Eurostat 2013.

Figure 10: Public Expenditure on Health in percentage of GDP



Source: Health Data, OECD 2013

Figure 12: Infant Mortality, Deaths per 1000 live births



Source: Health Data, OECD 2013

Tables

Table 1: Life Expectancy, Total population at birth

	1980	1990	2000	2005	2010	2011
Denmark	74,2	74,9	76,9	78,3	79,3	79,9
France	74,3	76,9	79,2	80,3	81,8	82,2
Germany	72,9	75,3	78,2	79,4	80,5	80,8
Greece	75,3	77,1	78,1	79,2	80,6	80,8
Italy	74	77,1	79,9	80,8	82,4	82,7
Portugal	71,4	74,1	76,7	78,1	79,8	80,8
Spain	75,4	77	79,4	80,4	82,2	82,4
Sweden	75,9	77,7	79,7	80,7	81,6	81,9
United Kingdom	73,2	75,7	77,9	79,2	80,7	81,1
United States	73,7	75,3	76,7	77,4	78,7	78,7

Source: Health Data, OECD 2013

f) Conference papers and presentations

Authors: João Sebastião, Luís Capucha, Pedro Estêvão, Alexandre Calado, Ana Rita Capucha(CIES-IUL)

Draft version 31.08.2013

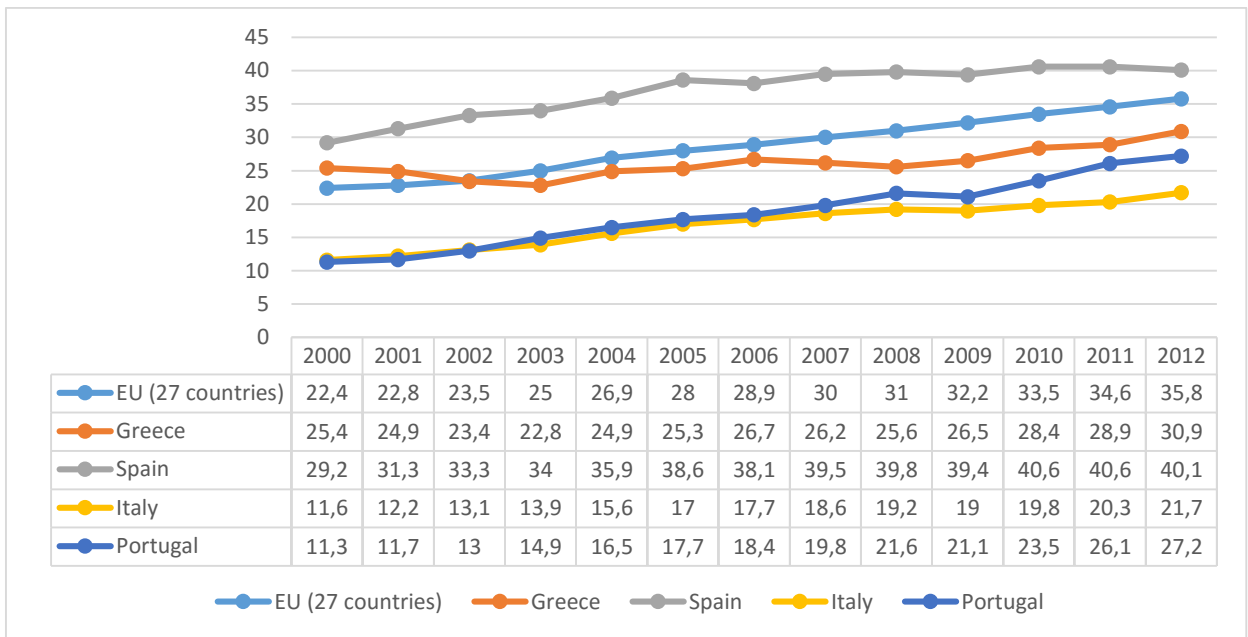
The current paper stems from the preparation work for the project “Education and Crisis in Southern Europe” (ECSE), funded by the Portuguese Foundation for Science and Technology, and which started last July. The project aims at assessing the impact of on-going economic crisis and of austerity policies over the design, objectives and performance of the education and training systems in four countries: Portugal, Spain, Italy and Greece. At the economic level, these countries share many traits typical of peripheral and semi-peripheral economies such as persistent problems of productivity and competitiveness – where deep-seated educational deficits play a significant part. With exports mainly based on medium-to-low added value products and non-transactional goods – particularly in Portugal and Greece, but also in Spain and several regions of Italy – these countries tend to be more vulnerable to the contingencies of the business cycle and the challenges of international trade deregulation.

Southern European countries also share some of the features of underdeveloped welfare states. Of particular importance is the fact that social protection is still strongly based on income replacement transfers, introducing significant disparities owing to different the quality of labour market insertion and consistency of contributive. Informal instances such as family networks thus retain an important role in addressing crisis moments in biographical trajectories – such as unemployment periods or old age. Again, these features contribute to amplify the social effects of economic downturns in these countries.

Last but not least, there are many similarities in the recent political history of these countries. Indeed, they all share relatively recent experiences of right-wing authoritarian regimes. Three of these countries lived under dictatorships between the 1930s into the 1970s – Portugal and Spain uninterruptedly and Greece intermittently - while Italy was, of course, the archetypal fascist state from the early 1920s until the end of World War II. These experiences have left long-term repercussions in the political culture, economic organization and in the social fabric of these countries. So much so that, at least in the case of Greece, Spain and Portugal, joining the European Union in the 1980s was to a large degree a conscious effort of political elites to anchor their then still fledgling democratic regimes and thus forestall eventual attempts of retrocession in this regard.

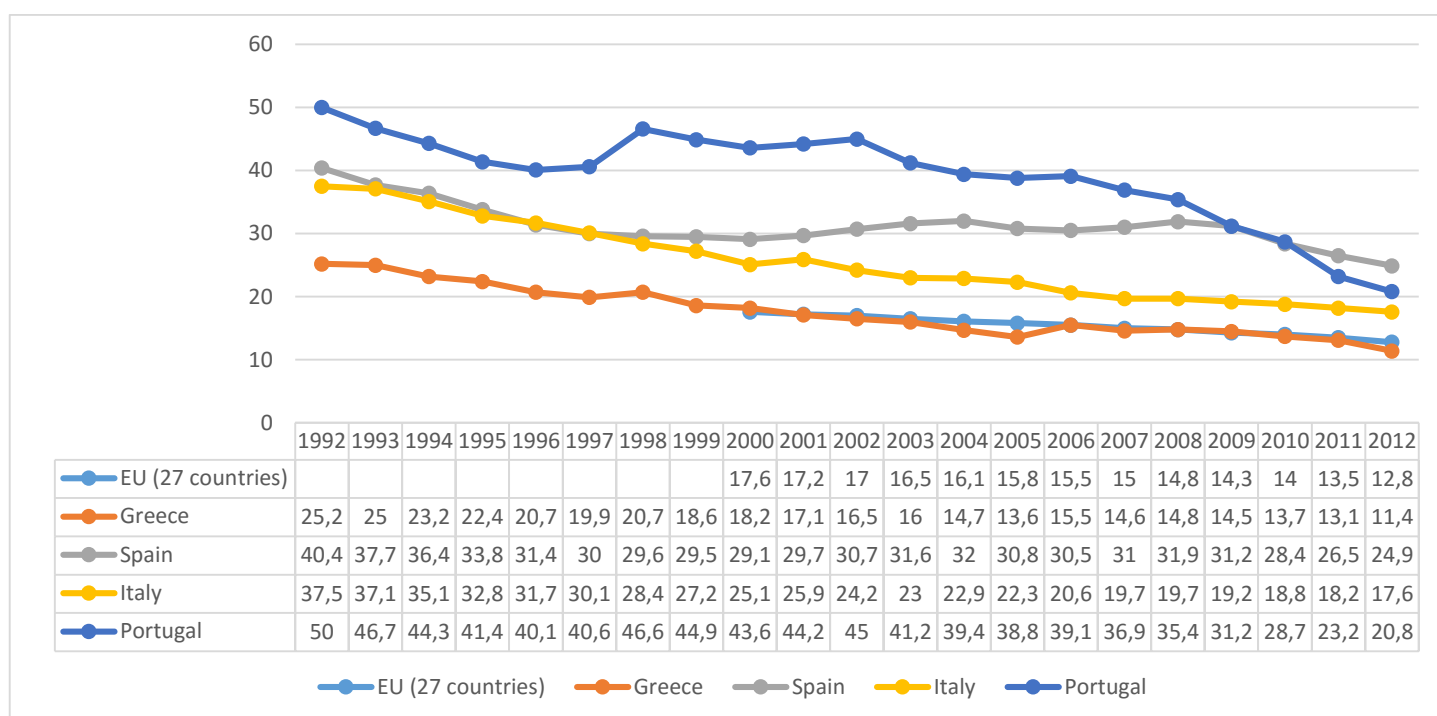
Specifically- that is the center of this paper - these countries also share persistent deficits regarding education and training. Just attaining to the key indicators of the Europe 2020 Strategy, we can see that Spain, Portugal and Italy make up for three of the four highest levels of early school leaving in the European Union (the other being Malta). If we move on to tertiary educational attainment with only 21% of its 30-34 year-olds in Italy have completed higher education degree – the lowest in the European Union, while Portugal also fares poorly in this respect, with only 27,2% - significantly below the EU average of 35,8%.

Figure 1 – Tertiary attainment 30-34 (%)



Source: Eurostat, Europe 2020 Indicators

Figure 2 - Early School Leavers from education (%)



Source: Eurostat 2020 Indicators

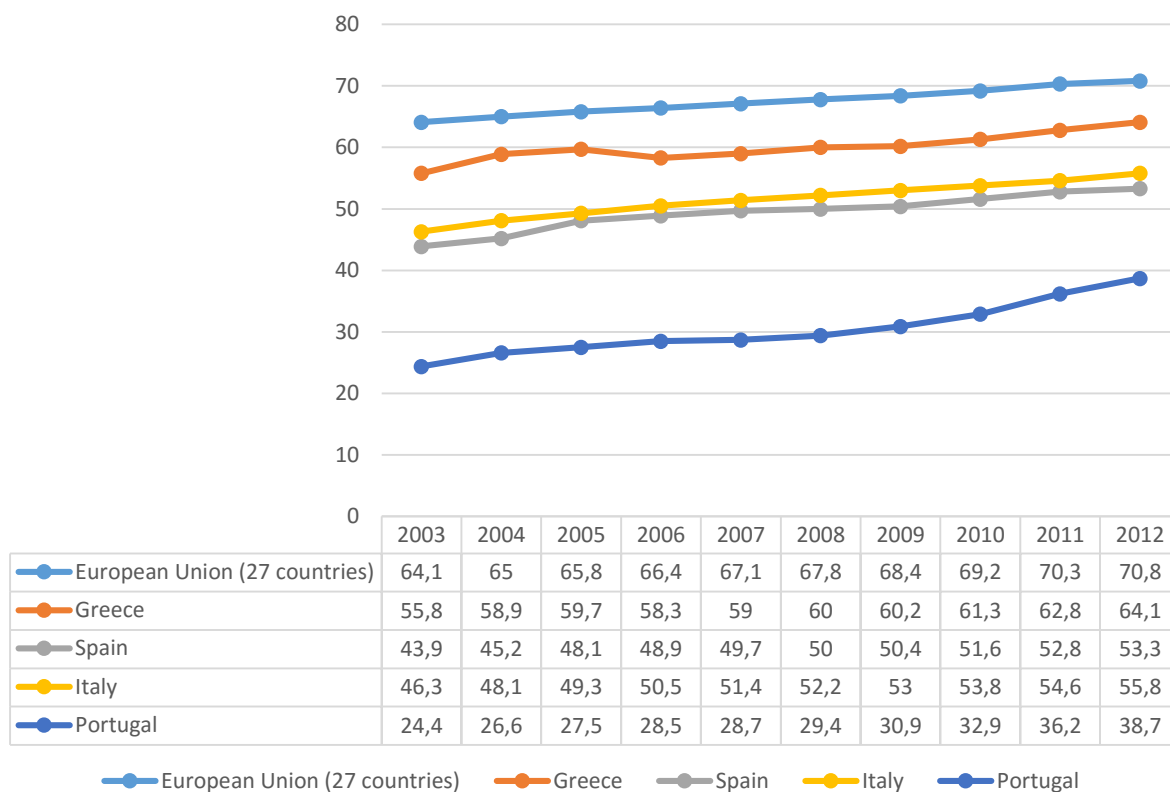
The result is that the qualification structure of the population is still heavily marked by the predominance of lower qualifications, with the economic consequences that were alluded to above.

Yet the progress shown by these countries in both fields must also be emphasized. Just considering the first two indicators, we can see that early school leaving in Portugal has fallen from nearly 50% in 2000 to the current 20,8%. A decreasing tendency - though less abrupt and more spanned in time – can also be discerned for Italy where early school leaving dropped from 37,5% in 1992 to 17,6% in 2012, and in Spain, where it fell from 40,4% to 24,9% in the same period.

As to tertiary educational attainment, we can see that Portugal more than doubled its proportion of 30-34 year-olds with a higher education diploma in 12 years, starting from 11,3% in 2000 and reaching 27,2% in 2012. Spain jumped from 29,2% to 39,5% in just eight years from 2000 to 2007, and staying close to this mark ever since while Italy, starting from 11,6% in 2000 has reached 21,7% in 2012.

As a result, we can see considerable changes in the qualification structure of these countries, even if they still lag behind EU averages. In Portugal, who had by far the worst starting point in this regard, the percentage of the population between 15 and 64 years-old having completed at least secondary education raised from 24,4% to 38,7%. Similar trends for the same period can be discerned in Spain (where it rose from 43,9% to 53,3%), Italy (from 46,3% to 55,8%), and Greece (from 55,8% to 64,1%).

Figure 3 - Persons with Upper Secondary or Tertiary Education Attainment (%) 15-64 years



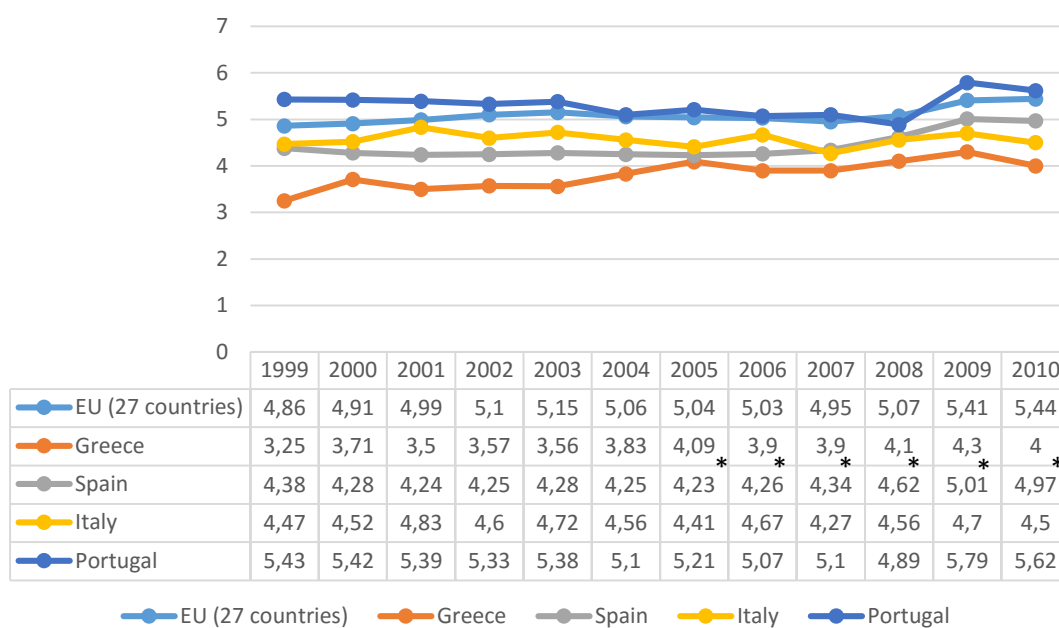
Source: Eurostat

Now, these countries have been subject to severe austerity economic policies from 2010 onwards. These policies have been pressed hard in Southern Europe as an answer to the debt crisis that followed the 2007-8 global financial crunch. Greece first and Portugal later were forced to ask for assistance programmes monitored by the IMF, the European Central Bank and European. Italy and Spain, while spared formal intervention, caved in to pressure by the Union institutions and Northern European countries to adopt full-fledged austerity packages.

Regarding the impacts of the crisis and its austere policy response on education, our hypothesis is threefold. First, we argue that, contradicting official documents stress on its importance for economic recovery and long-term social and economic development prospects, education has in fact been so far a net loser from austerity policies in these countries. Secondly, we argue that the extent of budget cuts in education and how austerity translates into concrete measures does not result only from external pressures but also – if not mainly – from the strength correlation between the political and social actors and blocks in each country and their respective agendas. Finally, we argue that the conjunction of these two developments endangers the recent favorable developments in education in Southern Europe and, consequentially, may contribute not only to render economic recovery more difficult and precarious but also to perpetuate the South's structural economic and social problems.

We will start by analyzing data regarding public expenditure in education and household income. The following graph shows us that in three of the countries considered in the current study – Italy, Spain and Greece – public expenditure in in percentage of GDP is inferior to the EU average. Note that Portugal is the odd case here, with public expenditure in education close to or slightly higher than the EU Average.

Figure 4 - Public Expenditure on Education (% of GDP)³⁰



Source: Eurostat

We can also see how evolution of public expense in education seems to have mirrored general economic policy response to the crisis. Thus, we can see that the four Southern European countries followed the trend of increasing expenses in education in EU between 2008 and 2009 - no doubt an effect of early expansionary response to the 2007-08 credit crisis.

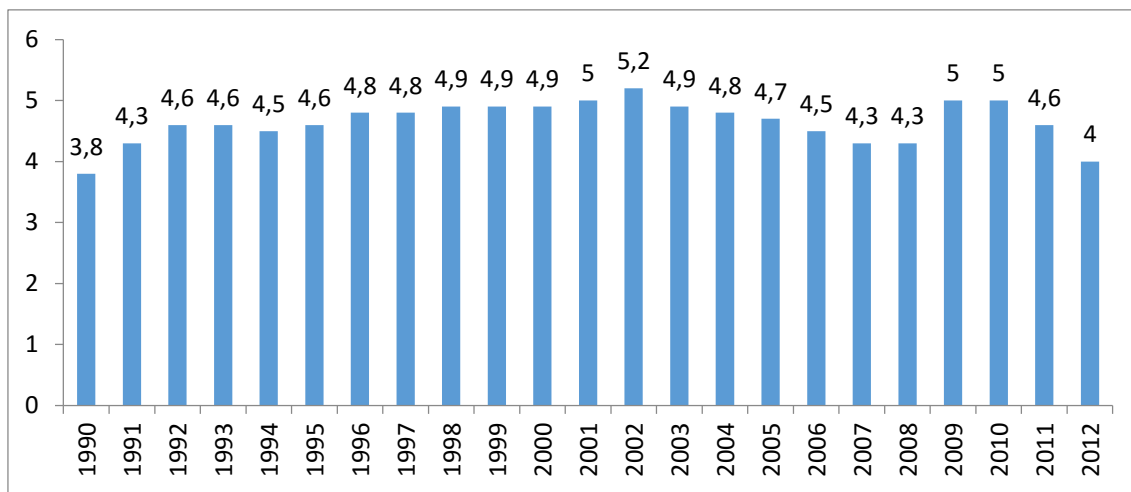
Then, and more to the point of this paper, we may begin to discern the impact of austerity policies implemented from 2010 onwards. Indeed, in 2010, public expenditure in education dropped by 0,3 percentage points in Greece, 0,2 p.p in Italy, 0,17 p.p in Portugal and 0,04 p.p. in Spain.

While we still lack more recent Eurostat data to be able to identify about a consistent trend, it is likely that this drop should continue as a result of continued austerity. Indeed, provisional figures of the Portuguese National Institute of Statistics regarding effective public expenditure in education³¹ dropped to 4,0% of GDP in 2012 – the lowest value since 1991. This represents a drop of 1 percentage point in two years – a number that is all the more impressive if we consider that the Portuguese GDP, which is the calculating base for the indicator, fell itself by 4,3% in the same period. We are thus talking about a reduction of roughly 25% in public resources allocated to education in Portugal in just two years.

Figure 5 – Public expenditure on Education in Portugal (% GDP)

³⁰ For Greece, from 2005 onwards, the data was provided by National Statistical Service of Greece and the calculations made by the ECSE team

³¹ Note that, despite official, this indicator is different than the Eurostat one – and so direct comparisons with the latter should be avoided. However, in the absence of Eurostat data for 2012, this indicator provides a valuable clue as to the dimension of the reduction of public expense in education in Portugal.

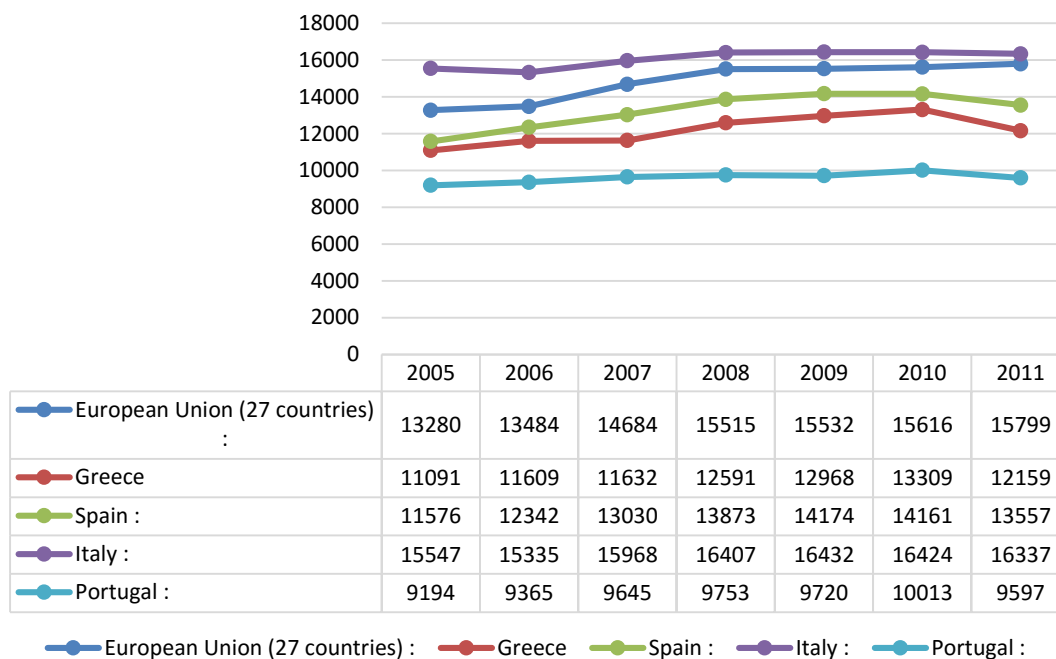


Source: INE-BP, DGO/MF, PORDATA

Now, it could be argued that such reduction would call for by private – namely family – resources to compensate the retraction of public expenditure in education. But the problem is this type of sudden retraction is one that families are in no shape to cope with as their own income is on the decline, faced with economic recession on the one side – meaning increased unemployment and lower wages – and public austerity on the other – meaning cuts in social provision.

According to Eurostat data, Greek households with dependent children faced a loss of 8,6% in their mean income between 2010 and 2011, while Spanish and Portuguese households lost respectively 4,3% and 4,2% . Household income loss in Italy in the same period was milder but still effective, standing at 0,5%.

Figure 6 - Households with Dependent Children Mean net Income (euros)



Source: Data Sources: Eurostat / National Entities; European Statistics on Income and Living Conditions (EU-SILC).

At the same time, and still according to Eurostat, final consumption expenditure of households on education, didnot change between 2010 and 2011 in the four countries – which, given general reduction of household income in the same period, actually means that the amount of family resources devoted to educationactually decreased. Even if commitment to education of adults or children in the household could push up private consumption expenditure on education in the next few years,the sheer scale of the reduction of public expenditure on education cannot be possible be remotely compensated by it.

What this means is that economic resources allocated to education in these countries are declining since 2010. There is thus a strong case for stating that austerity policies turned *education into net loser regarding resource allocation* in Southern European societies.

Besides gathering and analyzing quantitative data on the performance of the education and training system under recession and austerity, one of the main goals of our project is to analyze concrete policy measures taken in this context. If education is indeed a net loser of austerity, can the budget cuts be explained by external pressure alone? And how does austerity take concrete form at educational policy level?In this paper,we will focus on the Portuguese case, as gathering of data through our project’s network in the other three southern European countrieshas just now started. As to Portugal, we argue that austerity has in part been used as a cover for the adoption of specific elitist-conservative agendas in education – in some cases going to the point of adopting measures who that are at odds with the professed “neutral” goal of reducing expenses in a context of scarcity.

As we have seen, Portugal recorded a sharp drop in early school leaving and a rapid increase in tertiary level attainment in the last decade. Adult participation in education also soared, with gross schooling rates in basic education (a ratio between the number of individuals and individuals expected age for that cycle) jumping from 99,4% in 2006 to a peak of 149,2% in 2009. Finally, we can also identify significant improvements on the quality of learning and acquisition of competences by students. OECD PISA assessments, for instance, showed a significant positive evolution between 2003 and 2009, with the percentage of students ranking in the lowest level in reading and mathematics dropping considerably – to the point that, in this regard, the Portugal as by the latter date very close to the OECD average in mathematical competences and even surpassed it in reading competencies.

Public investment in education played a central part in producing this outcome. We can trace five key areas of investment: infrastructures, with modernization of elementary and secondary schools; the creation and mass social marketing of a national network of “New Opportunities Centres” for assessment and certification of adult competences and counseling for adult education courses as well as in the actual offer of adult education courses themselves; a vast increase of the offer of vocational courses in public schools, traditionally residual in the Portuguese system; revamping of the teacher lifelong training programmes, focusing on elementary level and on Portuguese language and mathematics; and the implementation in public schools of a broad set of mandatory measures designed to move towards a closer monitoring and increase assistance students risking underachievement, retention and early school leaving.

The implementation of austerity policies from 2010 onwards – in this case coupled with the election of a new, right-wing coalition government in mid-2011 - seems to have induced a sudden change policy design and implementation – and, as we argue below, goals. A few examples are:

- The dismantling of the national network of “New Opportunities Centres”. A much more restricted version in number and competences of these centres has been put forward in paper to replace it, but is yet to be implemented – leaving Portugal effectively without mass offering of adult education at the time.
- An increase on the maximum number of students per class from 26 to 30 in public schools.
- Restrictions on the offering of vocational secondary courses in public schools. The government has also been about a dual system explicitly inspired on the German model, but it has so far failed to take
- The abrupt termination of lifelong intensive training programmes for teachers for Mathematics and Portuguese
- The end of “Assisted Study” extracurricular areas and of the mandatory monitoring and recuperation plans
- The introduction of mandatory exams at the end of the 1st and 2nd cycles of elementary education (targeting 9 and 11-year-olds)

Now, some of these measures could be more or less expected on a country under an internationally monitored adjustment plan and consequent heavy austerity-oriented economic policy. Reducing the number of students may look somewhat odd in a country which has one of the lowest students-to-teacher ratios in OECD, but it might be understandable in that it satisfies an immediate need to reduce expenses by reducing the number of teachers under pay. The same goes for extinguishing extracurricular areas such as assisted study, which also required employing more teachers, or terminating intensive lifelong training of elementary level

teachers, whose model was very resource consuming. In any of these cases, one can argue that indirect costs through lower system performance will emerge on the long term, but the need to lower costs on the short term was for the time more important.

Yet, other measures do not fit this pattern short-term gains (despite long term losses) pattern at all. Indeed, some of them actually *increase* expenditure directly or have immediate and non-negligible impacts. Two paradigmatic cases are the introduction of mandatory exams at earlier stages and the dismantling of the New Opportunities network.

Even if we set aside considerable doubts about pedagogical value of the introduction of mandatory exams at such an early stage, one must necessarily recognize the existence of extra costs for the process to be implemented – be it on exam development or the mobilization – and paying - of extra teachers to watch over the classrooms.

The dismantling of the New Opportunities network without a proper replacement is also strikingly costly. Indeed, it has simply left Portugal without a coherent adult education policy framework for a period that is yet to be determined.

These are examples of choices whose rationale seems much more *ideological*, than *forced upon* by austerity and economic recession. Indeed they suggest that, at least in Portugal, there seems to be an *elitist-conservative* turn in education policy that takes advantage of the austerity context for its implementation. This agenda would envisage the school as a site of *social selection* with education having the explicit goal of transmitting disciplinary knowledge to younger generations and the implicit goal of inculcating values and norms fitting the social position determined by academic performance. This would go some way in explaining the emphasis on exams at such an early stage – the *selective* role of the school – or the negligence regarding adult education – as selection and value inculcation are supposed to take place *at an early stage* in an individual's life.

Whether this is the case or not, some of the more recent indicators on the performance of the Portuguese education and training system are a cause for concern. According to official Ministry of Education data, the rhythm of progression of real schooling rates for secondary level education (which measure the ratio of students in the expected age to be that are in the system) has stagnated: having risen quickly from 54,2% in 2006 to 71,9% in 2010, it has stagnated on 73,0% in 2011 and 2012. On the other hand, the retention and dropout rate at elementary level also shows an alarming tendency. Having fallen from 11,5% in 2005 to 7,3% in 2011, it has risen in to 9,6% in just one year.

Determining whether the slowdown education system performance and the elitist-conservative turn in education are specific Portuguese trends or if they are also being felt across the other Southern European countries will be the next steps for our project.

**ECPR General Conference
Bordeaux 2013**

The asymmetrical educational consequences of economic recession in Southern Europe

**Educational Challenges
in Southern Europe**

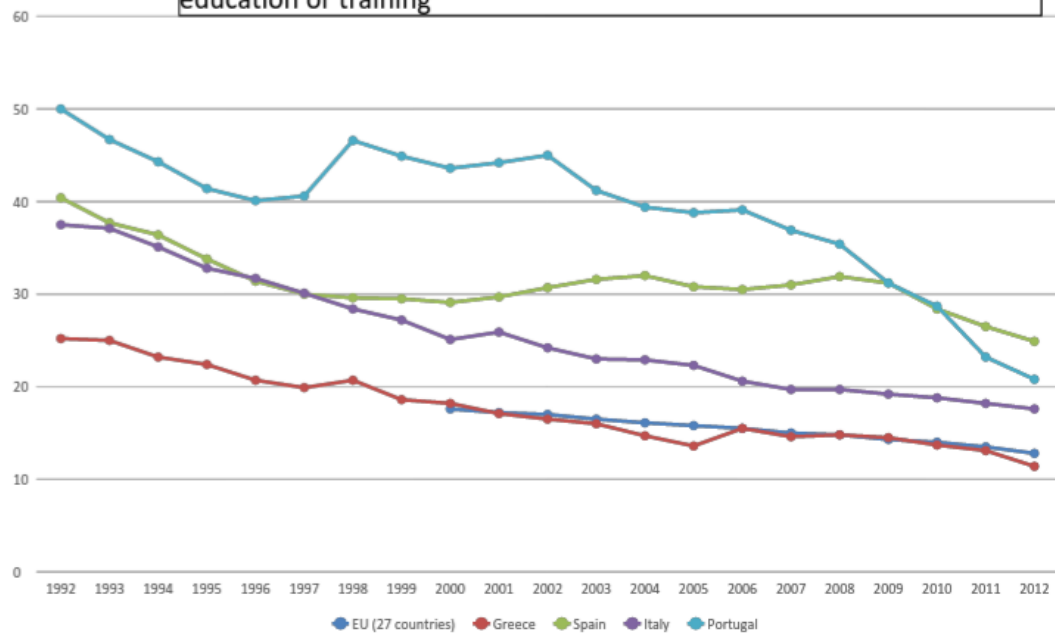
**João Sebastião
Luís Capucha
Pedro Estevão
Ana Rita Capucha**



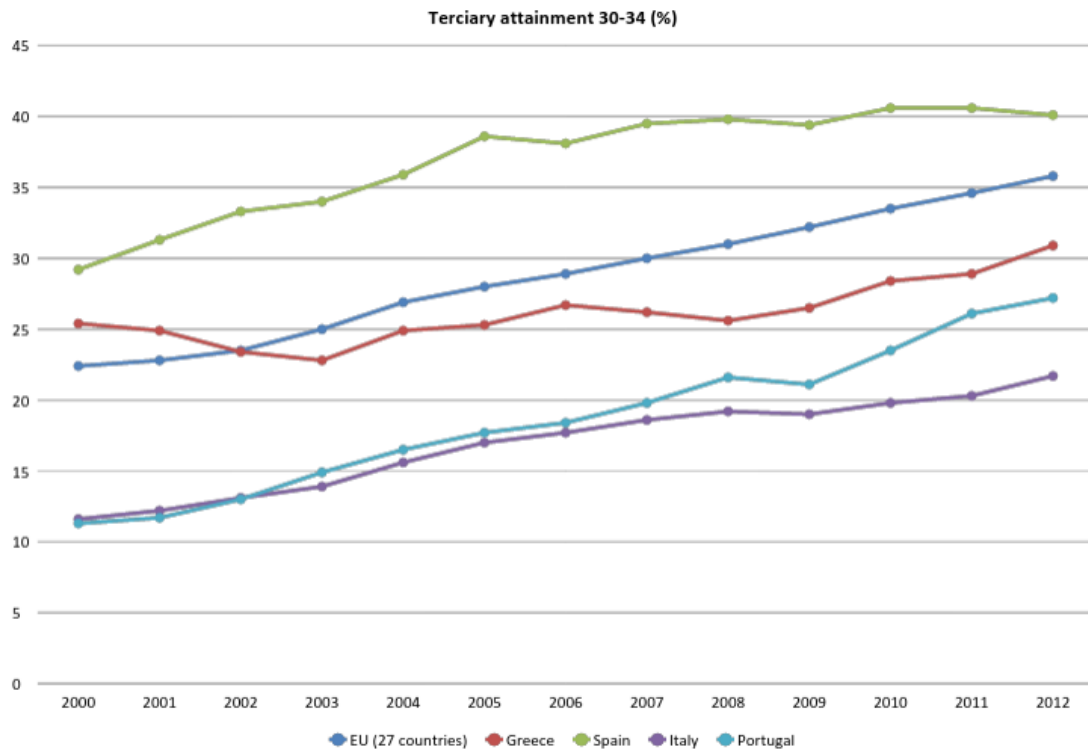
**We can speak about “Southern Europe” because
of a relevant set of similar economic, social and
political attributes :**

- **Relatively recent right-wing authoritarian experiences**
- **Economies with structural problems of productivity and competitiveness**
- **Underdeveloped welfare states**
- **The crisis has been particularly hard to southern countries**

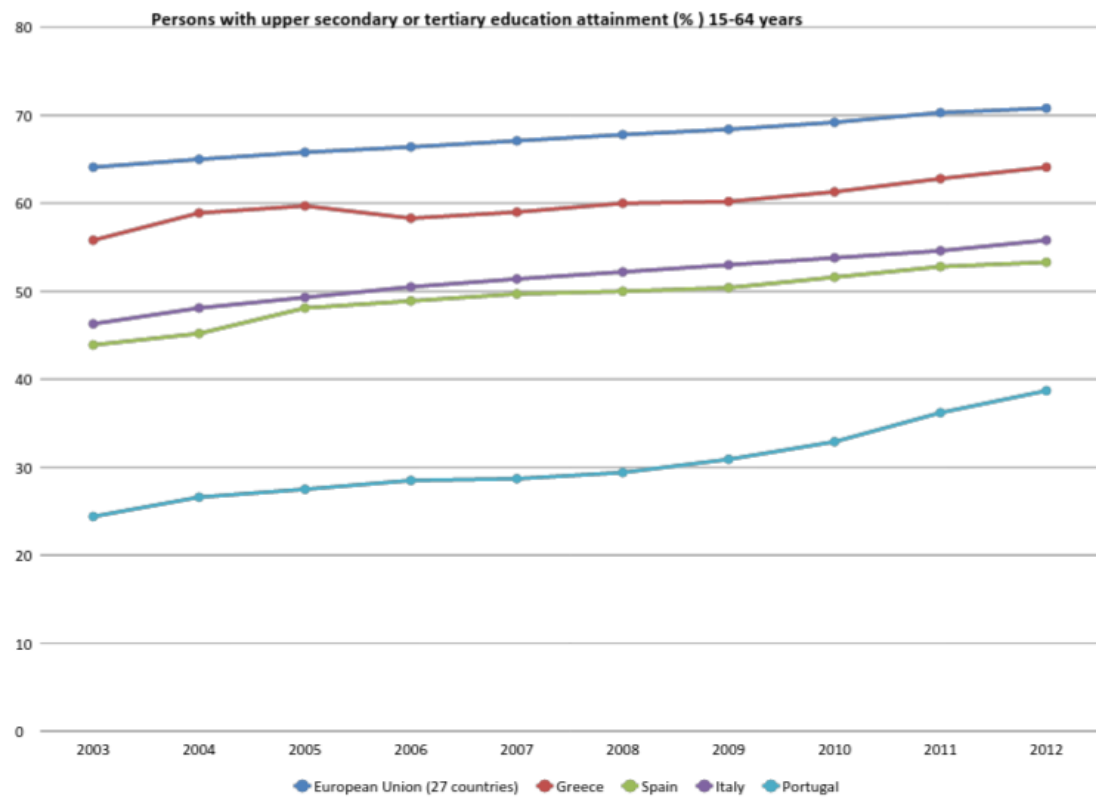
Early leavers from education and training - % of the population aged 18-24 with at most lower secondary education and not in further education or training



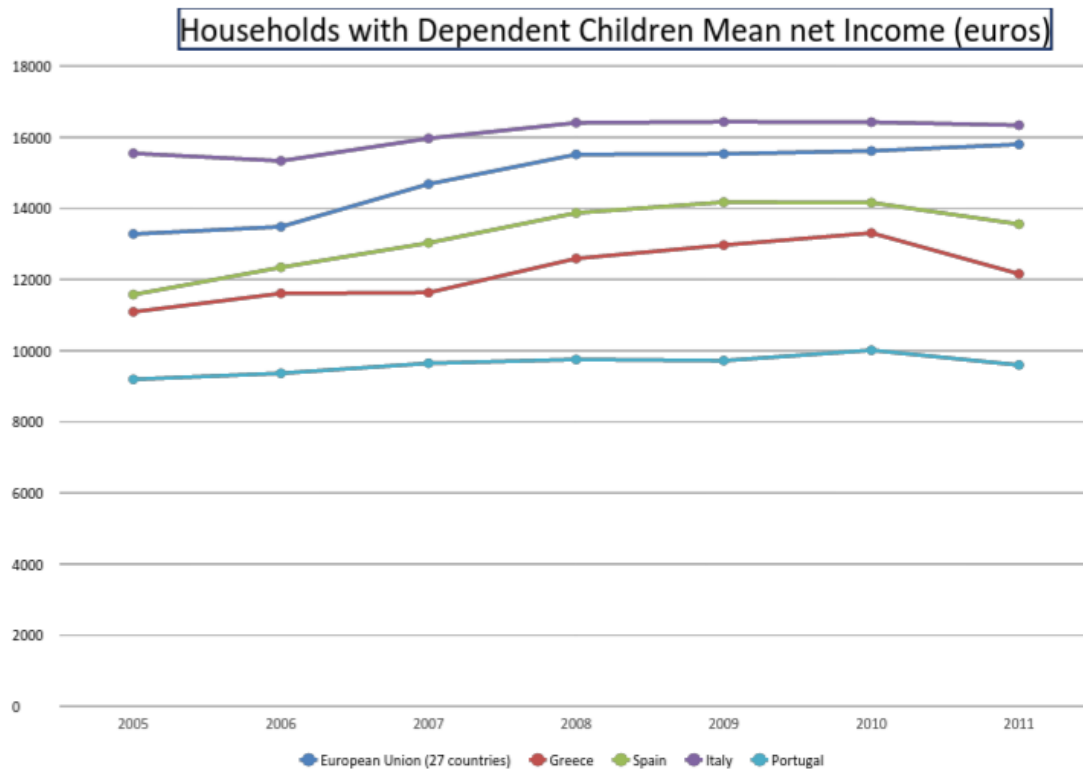
Data Source: Eurostat, Europe 2020 Indicators



Data Source: Eurostat, Europe 2020 Indicators



Data Source: Eurostat



Data Sources: Eurostat / National Entities; European Statistics on Income and Living Conditions (EU-SILC).

Political choices in Portugal

Reduction of students' scholar success measures and increased selectivity

- Termination or heavy reduction of all extracurricular areas such as “Estudo Acompanhado” – “Accompanied study”
- Increasing the number of students per class for 30.
- Public denial of the results of international studies (PISA and TIMMS) and increased selectivity through the difficulty of National Exams
- Introduction of new mandatory national exams at the end of the first and second cycles of basic education (9 year-olds & 11 year-olds)
- Return to a strong cognitive educational approach

Secondary Enrollement and Retention /Drop Out Rates

School Year	Secondary Enrollement (total)
2004/05	356.192
2005/06	326.182
2006/07	336.182
2007/08	329.993
2008/09	477.802
2009/10	462.784
2010/11	419.746
2011/12	390.109

School Year	Retention and drop out Rates	
	Basic	Secondary
2004/05	11,5	31,9
2005/06	10,6	30,6
2006/07	10	24,6
2007/08	7,7	20,6
2008/09	7,6	18,7
2009/10	7,6	18,9
2010/11	7,3	20,5
2011/12	9,6	19,7

Educational Statistics Portugal, 2013

Teachers

- Regrouping of Schools in larger Territorial Clusters, with significant reduction of teachers needs in several thousands of teachers
- Termination of integrated training programmes such as the “Plan of Action for Mathematics”, and the “Plan of Action for Portuguese” ..

Adult education

- Heavy breaking of adult education offer: termination of the “Novas Oportunidades” (New Opportunities) programme and return to recurrent education.

Funding options

- Assymetrical treatment on funding regarding private sector education (“association contracts”)
- Promotion of school choice and school voucher

Trends, not conclusions

- Some indicators show already negative impacts, even if data series are quite incomplete
- Some of the budget cuts are associated to financial restrictions, others to ideological options
- Decisions based in “aversion” to state intervention in society tend some times to be “anti-economic” but support elitist options

Pedro Abrantes, Universidade Aberta e CIES – Instituto Universitário de Lisboa
Sofia Amândio, CIES - Instituto Universitário de Lisboa
Susana Martins, CIES - Instituto Universitário de Lisboa
João Sebastião, CIES - Instituto Universitário de Lisboa
Rafael Feito Alonso, FCPyS - Universidad Complutense de Madrid

In this paper, we analyse the policies for the promotion of education quality, launched during the last decade, in Portugal, Spain, Italy and Greece, focusing particularly on the development of external mechanisms of monitorization and assessment, as well as on its impacts over teachers’ and students’ lives. This work is part of a wider project, titled *Educational Challenges in Southern Europe. Equity and Efficiency in a Time of Crisis*, financed by Fundação para a Ciência e Tecnologia, coordinated by João Sebastião (CIES-IUL) and involving 14 researchers, in the four countries.

The presentation includes five sections. Firstly, we discuss how the management principles are being introduced in the educational policies, all over the world, during the last decades, as well as the criticism and resistance raised among the educational communities. Here, we will focus the importance of the assessment systems over schools, teachers and students. Secondly, some remarks on the comparison between education policies in Portugal, Spain, Italy and Greece are sketched. Then, the article analyse if (and how) quality management policies are reframing educational experiences in these four countries, focusing on the international assessment programs (section 3.1), national exams to students (section 3.2), evaluation of teachers (section 3.3) and schools evaluation (section 3.4).

Quality, education management and education policies

If educational policies were dominated throughout the 20th century, all over the world, by concepts as universal access, development and equality, from the 80s on, there is a growing emphasis on concepts as quality and assessment. This doesn’t mean that the latter concern is necessarily opposed to the former, and the most enthusiastic actually sustain this is an essential path to achieve the former orientations, but one shall accept that there is a new approach.

Such approach, as it is happening also in other traditionally public sectors as health or social security, is clearly influenced by the management framework, not only in the way efficiency is pursued in the use of the minimum resources to maximize the goal achievement, but also as education and the agents involved are conceived: education as a service to be provided; parents, teachers and principals as consumers, providers and managers. Although there is a discussion over in which measure the ultimate goals are specific for education and/or for the public sector, the tools used to reach them are based on developments taking place in the management field. Therefore, quality – a vague concept that everybody agrees with – is systematically used as a way to legitimate

standardized assessment programs over students', teachers' and schools' performances, carried out by international organizations, national governments or external agencies, enabling the conversion of learning and teaching in tangible products (Sallis, 2005). Educational quality is then presented as a duty of educational professionals and institutions (the providers), and simultaneously as one of the main parents' right (the consumers), as well as a key for economic growth and social development, although such relation is not always evident.

Although such changes were documented (and often criticized) by scholars in many countries, during the last decades, usually taken as part of a "global agenda" (Popkewitz, 1991; Carnoy and Rothen, 2002; Teodoro, 2008), dominated by capitalist and neoliberal forces, it is not evident that education policies are converging all over the world, and that their outcomes for students and teachers are homogeneous, even within Europe (Martins, 2012). As noted by Archer (1979) or Petitat (1982), education policies are the result of the interaction between multiple agents and forces, acting at different scales. Or, as Stephen Ball (1998) put it, there are common elements in contemporary international policies, but one shall also examine the translation and recontextualization processes, at national and local levels. Including in the core

Besides, it is particularly useful to analyse the recent developments taking place in educational assessment in Portugal, Spain, Italy and Greece, at least for three major reasons.

Firstly, avoiding moral judgments, one shall recognize that this new agenda introduces a huge shift in the way education was socially constructed, in the Southern Europe. Rooted over the influence of religious and military institutions, educationalists gave sense to their work and position in the world, based on a humanist and illuminist ideology. Schools and teachers were those who were taking civilization and culture to the people. Obviously, the authoritarian regimes during the 20th century developed strong systems of control, but they were based on political and moral concerns, and the expectations of many educationalists was that they would be removed in a democratic era. Besides, the development of educational systems in these countries was considerably delayed, in comparison with the other European countries, and it occurred through a state-based, centralized and nationalist framework (Enguita, 2001).

Secondly, the economic crisis during the last years was particularly severe in these countries, and its effects over education policies are not lineal. On the one hand, the national states became more vulnerable to European Union and other powerful international organizations, so that pressures to accelerate "structural reforms", in order to reduce costs and to improve efficiency in the public sector, to expand the markets and to attract external investment, were magnified. On the other hand, the huge cuts over education (as well as other sectors) and the permanent political instability generated by such austerity policies has affected the (economic, social and political) viability of some reforms that were planned or already taking place.

And thirdly, one shall not take for sure that educational trends are homogenous in these four countries. Although Portugal, Spain, Italy and Greece are currently taken as similar in many international debates, especially at an European Union, this eludes the important differences between them. For instance, in Portugal, Spain and Greece, authoritarian regimes ruled until the late 1970s and EU integration just occurred in the 1980s, but this is not the case in Italy; The Catholic Church is traditionally powerful in Portugal, Spain and Italy, but in Greece the Orthodox Church is dominant; Portugal and Greece were committed (and supervised) during the recent years by an international financial assistance program; Italy and Spain are bigger countries where the public systems, including education, are partially organized by regional structures; governmental instability during the last years was higher in Greece and Italy, than in Portugal and Spain; and so on. One shall wonder if some of these factors have influenced the educational policies, especially on assessment measures.

Monitoring education in southern Europe

Quality-based educational policies were carried out in Portugal, Spain, Italy and Greece during the last decade. A common standpoint is that national assessment systems in the four countries were weak during the previous decades, characterized by a huge increase in the number of educational institutions and professionals. However, according to our data analysis, there are considerable differences concerning the intensity of such policies and also the programs carried out in each country to achieve “quality”. Only in higher education, after Bologna settlement, it is possible to observe a consistent process of convergence concerning the assessment of institutions and graduations, in the four countries. Still, such assessment system appears to be focused in so far on formal aspects of institutions, teachers and graduations, rather than over learning patterns and outcomes. In basic and secondary education the evolutions taking place are more diversified.

In Portugal, quality became a key concept in political agenda from the 90s, especially in relation to a strong criticism over teachers in the media. From 2005 on, national programs for assessment of schools, teachers and students were carried out, through very different methodologies and the relations between them are not evident. Although students’ scores in PISA tests have increased considerably during the last decade, such assessment systems were a huge focus of controversy. Especially, the assessment of teachers generated massive demonstrations in the streets and it was partially removed, not being clear their effects over the improvement of teachers’ pedagogical practices. Meanwhile, while schools evaluation system is often neglected,

national exams over students in the end of each educational stage are used by the media to generate annual rankings of schools, contributing for competition between schools, pressure over teachers and stigmatization of those with lower scores. From 2011 on, under a right-wing government with a more conservative vision of education, national exams were reinforced, and they were criticized as a mean of pressure over teachers and children, back-to-basics orientation, exclusion of vulnerable groups and increase of retention rates.

The Spanish education has a regional autonomy within a centralized framework. It is a relatively decentralized system. Through the Ministry of Education, Culture and Sport (*Ministerio de Educación, Cultura y Deporte, MECD*), the central government designs the legal framework regulating the principles, objectives, and organization of the different school levels, as well as a proportion of the contents and subjects studied. Ministries (or departments) of education from the 17 regions develop and manage their education systems based on these guidelines. Other bodies also shape education policy (Alonso, 2015).

Italy, compared to other OECD countries, is characterized by underdevelopment in terms of monitoring and evaluation practices of the educational system (Colombo, 2015). However, the demand of evaluation of the educational system in Italy increased over the last ten years (Fondazione Giovanni Agnelli, 2014). First, the disappointing results collected by OCDE PISA 2003 about Italian students compared to international data. Second, the increasing autonomy of schools that required a wider control from central authorities. Third, the Philosophy of the New Public Management. According by Brunetta Law (n. 15 / 2009) the work of all public administrations has to be evaluated according to efficiency criteria. Forth, the effects of Internet Culture: families require more information and data on the quality of schools in order to make the correct school choice.

The Greek education system has been monitored according to the principles of public management until today. The formal education system is wholly managed and controlled by the ministry of education. There is little autonomy given to schools and these only refer to extracurricular events and other such activities. As Vasiliki Kantzara (2015) points out, the lack of autonomy at a large scale goes today hand in hand with

evaluation perceived more as an instrument of control than of attempting to improve the education system. Changes related to evaluation and quality assurance were introduced in 2005 and 2007 and started being implemented at a large scale after the law 4009/2011.

The impact of international programs of students' competences assessment

In the Portuguese context, several institutions and international tests have played their part in through studies and recommendations, but the OCDE PISA program is clearly the most influential. It was from these international studies and models that the current external evaluation system was built in Portugal (Lemos, 2014). Briefly, the OCDE, the International Association for the Evaluation of Educational Achievement (IEA) and the European Commission (CE) have promoted international programs evaluating children's and youth's performance worldwide, in math's, sciences, reading and foreign languages. Since 1991, Portugal has participated in comparative studies on educational achievements³². These participations revealed a major influence in the development of OCDE's instruments for examining national policies worldwide, focusing in the organization of each educational system and recommending specific public policies. The main aim has been to construct, compile, consolidate and disseminate international comparable indicators, through what later became the IIEES, for further uses on governance mechanisms, standards and benchmarks, and into detail of prescribing behavior and to influence convergence processes between countries.

The results of 2009 and 2012 PISA studies indicated that the general school performance in Portugal was converging to the OCDE's average, particularly for mathematics and science – decreasing the differences in at least in 30% from 2000-2012, while for reading skills, in about 18%. In addition, there was a decreasing on the number of students with the lowest performance – of about 5% less in general, and 8% less in reading, while increasing the numbers of those with highest performance. Nevertheless, PISA studies have continuously emphasized that the Portuguese case still indicates a

³² (the International Assessment of Educational Progress (IAEP I and II); IIEES – International Indicators and Evaluation of Educational Systems; PISA – Program for International Students Assessment; TIMSS - Trends in International Mathematics and Science Study; PIRLS – Progress in International Reading Literacy Study; ESLC - European Survey on Language Competences; IECL; EAG - Education at a Glance, PIACC etc...)

close relation between PISA performance and students' retention (though also slightly decreasing).

Spain's educational results remain below OECD averages despite a 35 percent increase in funding since 2003, the results of the triennial OECD-run Pisa study show. While Spain's 15-year-olds notched up marginal improvements in reading and science scores, mathematics results for the test of students near their end of their compulsory education remained at 2009 levels. Scores for reading climbed from 481 in 2009 to 488 points in the latest PISA study. There was also a slight improvement in science results from 488 to 496. But mathematics scores barely shifted for Spain — moving from 483 points to 488. All this means Spain "remains anchored just below the OECD average" in all three categories, according to Pisa researchers.

The PISA researchers said Spain could improve its scores by giving schools greater autonomy over their curriculum. They also said low teacher morale could be prevented by linking positive professional appraisals to higher salaries. On a positive note, the PISA study found that 87 percent of Spain's students were "happy at school" compared with an OECD average of 80 percent.

The, till now, country's largest opposition group, the socialist party (PSOE) used the results to attack new government reforms, saying cuts would undo all the good work done by Spain over the last few years. But the Popular Party government pointed out higher spending wasn't necessarily linked to better performance (Alonso, 2015).

The last PISA report has been issued in 2012 and reported a worse performance of Italy compared with the average of OCDE countries. Nevertheless comparing this wave with the previous data collections, Italy shows some improvement: from 2006 to 2009 average scores increased and 2012 confirms this trend. However, a great territorial divide still features the educational performances of Italian students and national surveys, which confirm it. This difference is very significant if we consider performances in mathematics and in readings in some Italian region (Trentino, Friuli Venezia Giulia, Veneto, Lombardia) where students are among the best performing students in OECD area, compared to very poor performances in Southern regions.

Italy participates also to IEA surveys in the collection of PIRLS and TIMMS data. Despite this participation, limited efforts are dedicated to further analysis and

reflections on results. Not many studies have been developed based on this data and their dissemination usually occurs with a consistent delay compared to the time of collection. INVALSI (National Institution for the Evaluation of the Educational System) for the first time in 2011 published the national report in conjunction with the international one aiming to enhance the wider use of these surveys³³. It reports also the main features of Italy in terms of student characteristics (especially familiar background) and learning skills, educational practices and schools structure. However, PISA, and especially IEA data, does not seem to be used in an appropriate manner when it comes to educational policies in Italy. First of all, they have often declared the willingness to use data collected by these international surveys for purposes that the same surveys do not consider feasible, as the evaluation of the single schools. But the most significant point is that Italian political representatives systematically ignore the results of these surveys to reform the scholastic system (Gentile e Rubino, 2011, p.197)

Concerning student's performance at an international level by which the system could be indirectly evaluated, apart from the PISA study, Greece does not participate in other international assessments, such as TIMMS (Trends in International Mathematics and Science) that studies trends in competencies in mathematics and physics at the last year of secondary education, nor at PIRLS (Progress in International Reading Literacy Study) that documents trends in reading comprehension at fourth grade of primary education (more details, see at timmsandpirls.bc.edu). Although the results of PISA are rather controversial in public opinion and it is not evident its role to the education policies carried out by recent Greek governments, the students' scores in this program remains far below the OECD average, especially in Mathematics, but they slightly increased during the last decade (OECD, 2013).

Briefly, the four countries have participated intensely in international tests assessing students' competences, and such participation, especially in the PISA program, has an important impact over public debates and evaluation systems, although the linkage to broader educational policies is not always evident. Besides, the national scores in the four countries were near de OECD average in Spain, and below this average

³³ The 2011 INVALSI Report on PIRLS and TIMMS data presents the main results of the five surveys: comprehension on readings, mathematics and science in the four grade of primary school and mathematics and science in the third grade of lower secondary schools.

in the other countries, but they have been improved during the last decade, especially in Portugal and Italy, while in Spain such scores were stable (OECD, 2013). Therefore, some convergence is apparent, especially if one considers that most central and northern European countries has decreased PISA average scores during the last decade.

National programs to assess students' achievements

Since 1999 INVALSI is the Ministerial agency charged of three main tasks: evaluation of efficacy and efficiency of the national educational system; progressive improvement of the quality of the educational system in order to provide an equal distribution through the territory; Collection and diffusion of quantitative data on national school system and the results of students learning. More in details, INVALSI has been charged by the Ministry Directive n. 85 /2012 of: Periodic and Systematic (every 12 months) evaluations on students' knowledge and skills and on the whole educational offer; Studying the causes of drop-outs and early school leaving; Elaborating the written national tests to assess the general and specific students' learning at the end of the lower secondary school; Providing models and guidelines to facilitate schools in the formulation of the "standard test" (the so called "Third test") at the end of the upper secondary school; Evaluating the performance of students terminating the upper secondary school according to international criteria in order to ensure the comparison with other countries. Providing support and technical assistance to school administrations, regions, provinces, territorial agencies, training agencies for improving independent practices of monitoring and evaluation; Education and training activities for teachers and principals; Research activities; Ensuring the Italian participation to European and International research projects in the field of evaluation; Counselling and assisting schools for self-evaluation projects.

Since their introduction INVALSI tests have been under discussion. Criticisms are moved towards the models they are inspired to, because they are rooted in cultural contexts different to Italy (such as the Northern European and the Anglo-Saxon area). Then these kinds of tests would be not suitable to evaluate the Italian system. The incoherence between the teaching model and the evaluation system would lead to risks

such as cheating, teaching to test and other issues that affect data validity and affordability. Nevertheless, these tests are the only evaluation tools currently existing in Italy, standardised and on an individual basis. It needs to be remembered that in the past in Italy there was total absence of evaluation practices, due to cultural and financial reasons. MIUR instead manages the National Registry of University Students providing open access to data on a basis of single academic unit.

In Greece, it is not clear how primary and secondary education is being controlled: there are no official reports written, unless a director of a school or a school advisor drafts one because s/he wants to point to a problem. The responsibility of running the education system lies with the ministry of education: such is the case with the PISA results, in which Greek students do not perform so well; in such a case, there are no formal organization structures responsible to carry out a discussion, only the ministry of education could issue a report or plan a study into this.

Evaluation has been the subject of vehement debate. Some consider it a means to control education, to enforce conformity, to punish those who disagree with the decisions of the education authorities, or simply who are different from their department heads or school directors. In the words of an education policy expert: “Research in the European context has shown that quality assurance policies (strongly promoted by the EU) are associated with reduction of public funding due to the withdrawal from welfare states... It is therefore important that the social actors (academics, students etc.) resist the above policies through their active participation in decision making both in national and international contexts” (Prokou 2014a, expert interview, 2-12-14).

In Greece, the views expressed above go hand in hand with the opinion that evaluation could be a means to be used in order to improve quality, but it has to be done differently than the one promoted by the Ministry of Education. According to the education expert, an evaluation system has to be set up after all: “However, it is equally important that they work towards a coherent system of evaluation of higher education institutions, which will emphasize peer reviewing and internal forms of evaluation, leading to quality with reference to the rules of the different disciplines, otherwise “university work” (instead of “university productivity”). This is a major challenge for the

Greek universities, which do not have a long tradition of an evaluation system.” (Prokou 2014a, expert interview, 2-12 2014.).

Teachers evaluation

The assessment of teachers’ professional performances is one of the most controversial topics of political agenda in Portugal. In 2008 and 2009, the Socialist Party government a national program to the compulsory assessment of all teachers by school principals and coordinators, included in the existing system of public employees’ annual assessment. However, it generated a huge resistant among educationalists, well-organized by teachers’ unions and supported by all parties in opposition, so that this program was simplified. The former assessment system based on administrative data and self-evaluation was restored, and just those who are candidates to the highest classifications and to grade promotion has to apply to the complete process. Still, since grade promotion is blocked, due to austerity policies, few teachers apply to such evaluation. Besides, the right-wing coalition elected in 2011 was committed to their opposition to the teachers’ assessment program, so in spite of a huge moral discourse on the need to restore rigour, discipline and accuracy in schools, their policies concerning teachers were focused on appliance of a national test of common knowledge. Once again, after a huge resistance of unions, the Ministry of Education decided that only young teachers (with no experience or less than 5-years of teaching experience) are obliged to apply to this exam and they have to be approved to be allowed to teach in public schools.

In Spain, the evaluation of teachers is made on a regular basis by school principals. Still, since they are former teachers, not specialized in this area, have little time to spend on it, and school teachers participate regularly in their election, few principals are committed to an effective assessment of their “colleagues” (Enguita, 2001). The inspectorate is only involved in evaluation of teachers under specific circumstances, such as career promotion (EACEA, 2013).

Italy is characterized by the absence of evaluation of teachers (Eurydice Italia, 2009; EACEA, 2013). The topic of education, training and recruitment of teachers in Italy

has always been a delicate one. It became even more controversial since the abolition of the SSIS (High school for Teaching) in 2008. Until 2008 SSIS (since 1999) it was the only available pathway for future secondary teachers while a Degree in Primary Education (since 1998) was requested to become a primary teacher. This new system has been characterized since its beginning by a high degree of precariousness, especially affecting SSIS that has suffered from the uncertainty of continuity at the end of each academic year (Luzzatto, 2011). Once abolished, this specialization school has not been substituted by another institution so that many future teachers have been for years in a limbo waiting for their qualification and working in very precarious conditions, even if fully qualified. In 2010, new guidelines for obtaining the qualification have been issued.

According to the European patterns, teachers' education is divided in general and professional component (Eurydice, 2013). In Italy, teachers at primary or pre-primary levels of education are trained under the concurrent model, which means that they acquire general and professional competencies right from the start of their tertiary education. Lower and upper secondary teacher instead are trained according to the consecutive model, so that they acquired their professional competencies at the end of their degree. While in most of the European countries, an upper secondary certificate is enough to access the teacher education, in Italy teacher students are required to take a specific examination decided by the national education authorities. So, Italian teachers in fact enter into the labour market through a competitive examination alongside with a candidate list. These lists, set at provincial level, include not only prospective teachers who have passed competitive examinations, but also those who obtained their qualified teacher status through sporadic one-off qualification procedures (specifically reserved for unqualified teachers with at least 360 days of teaching experience), or through attendance at SSIS (the former post-degree specialisation schools for teaching at secondary level) (Eurydice, 2013, p.47).

The employment authority varies according to the typology of contract: teachers with a permanent contract are employed by the Regional School Office, a branch of the Ministry of Education. Teachers with a fixed-term contract are recruited instead from a regional list and the contract is made directly with the school (Eurydice, 2013, p.49). In Italy, as in most of the European countries teachers have to pass through a probationary

period that implies 180 days of valid service in 12 months. This period thus is fixed and valid for all ISCED levels. Despite the attempt to reform the educational track for teachers, a critical issue in Italy remains the lack of coherence between education pathways and recruitment practices. One other weakness point for the teacher's career is the scarce supply for training on-the-job.

Teachers in Italy enjoy a wide autonomy in students' evaluation, which includes the definition of the evaluation criteria, the decision of repeating one year and the elaboration of tracking/final exams. Since 2007/08, the final exam at the end of the 1st cycle of the education in Italy includes a set of tests elaborated directly by teachers (Italian language, two European foreign languages, mathematics, science, arts-technology and a multidisciplinary oral exam) and, only since 2008, in addition, a national written exam (INVALSI test) composed by open and close questions in reading and mathematics is compulsory.

In Greece, teachers - an integral part of the education system - are treated as a 'necessary evil': lowly paid, their work is not highly estimated by education authorities, and their opinion is not asked whenever education reforms are planned. They do keep a necessary degree of autonomy to carry out their work. Teachers' reaction to the planned evaluation was therefore massive and negative. Issues, such as recruitment and in-service training that I mentioned above in the previous section continue to be a matter of concern, for on the whole are evaluated as 'insufficient'. Until 2007 the Greek education system is monitored and managed according to the principles set by public management. After 2011, new laws plan different management structures, and introduce evaluation as an instrument for quality assurance, according to international standards. However, due to the past uses of the instrument of teachers' evaluation, today it is still perceived as a means of control, enforcing conformity and punishing rather than as a means of improving effective quality education.

For the evaluation work, funds were made available, as well as for other administration structures that are new within higher education. In addition, evaluation does not include departments or universities, but it extends to evaluation of personnel that it has been planned, but partly implemented, with the exception of academic staff members, who are being every year evaluated by their students since 2011. The plan for

evaluating public servants remains to be carried out, together with the administration personnel in schools and teachers of the other two educational levels.

In conclusion, the evaluation of teachers is a controversial topic in Southern European countries, and any of these four countries have a consolidated system to assess all teachers, in a regular basis. Although some policies were launched during the last decade, a strong resistance was apparent from teachers, and the austerity policies taking place made such policies hardly feasible. The erosion of teachers' working conditions and the absence of promotions and rewards, in a context of privatization policies, pave the stage for a common idea that a new program for the evaluation of teachers would be merely used to dismiss and to demote many teachers.

School evaluation

According to a recent Eurodyce Report (EACEA, 2015), external school evaluation is carried out in most European countries, although a great diversity of models is in use. In Southern Europe, such heterogeneity is apparent. This report concludes that while in Portugal and Spain there are national systems of school evaluation, in Italy there is also a pilot project and in Greece (as for instance in Finland) there is no national system for the schools evaluation. Besides, the Portuguese system is considered the most complete one, among this group, since the external evaluation is developed by a team of inspectors and other experts in education, school teachers, pupils and community participate in the evaluation process, external evaluation is linked to the self-evaluation, the school board is consulted before the end of the evaluation report, and the each school external evaluation is publicly disseminated. For instance, in Spain, the external evaluation is carried out by the Inspectorate, but community members are not consulted and the evaluation reports are not public.

In parallel to the international evaluations, national Law n.º 31/2002 defines the non-high education evaluation system (pre-school, basic and secondary education) in Portugal, based on self-evaluation in all schools, and external evaluation – with multiple initiatives from private and public entities, not rarely related to the existing international evaluation assessments. After some experimental programs, the schools evaluation system was launched in 2005 and it was developed during the last decade by the General

Inspection for Education (IGE), linked to the school autonomy policies (Coelho, Sarrico, & Rosa, 2008). It was influenced by school evaluation systems in other European countries, especially in Scotland, but it was also carried out in the context of the media annual publication of the “rankings of schools”, based on the average scores of students in national tests.

The corresponding advices and recommendations of CNE from 2006-2011 evaluation focused in autonomy and participation issues, and can be divided in three moments. Firstly, the Parecer n.º 5/2008 (of 13th June) underscored negative effects of school rankings but giving importance in continuing the schools’ evaluation model and the different responsibility levels within the system – local, regional and national, while coordinating auto-evaluation with the external one. Secondly, the CNE Parecer n.º 3/2010 (of 9th June), recommending the extension and deepening of the consultation mechanisms, namely reinforcing the municipalities and parents participation. Finally, the n.º 1/2011 CNE Recommendation (of 7th January), focusing on the three main aims of schools’ external evaluations: the training of the school community; the regulation allowing elements that support schools’ decisions; the participation of all elements in schools through a formative perspective that reinforces auto-evaluation. Last but not least, these recommendations raised the need to include private, cooperative and solidarity networks, in complement with external evaluation. In sum, focusing the attention on students as well as on the need to adapt the trajectories proposed by the system, they define these priorities in close relationship with the local community, thus, calling different agents for their responsibilities while reinforcing also the need for social certification, efficient management of the existing resources and of the regulation mechanisms producing relevant information.

However, there seems to exist, still, an apparent homogenization of schools in the external evaluation reports, which contributes to the social construction of schools strongly dependent from policy measures and administrative choices for their management and organization. Such construction of a specific school model has shown potential effects in segregation schools accordingly to the evaluation results, when it should, on the contrary, contribute to improve the school activities, and learning practices (Velooso, Abrantes & Craveiro, 2011).

Indeed, in Lemos (2014) view, schools' external evaluations may lead to two essential functions, retroactive information, meaning creating monitoring practices to adapt policies and the management of the pedagogic process, as well as social certifications, i.e., creating social trust in society. Lemos (2014) sustains that the current national evaluations have been the main changes of educational policies possible to be identified in the short term. As also expressed in Veloso, Abrantes & Craveiro (2011), Lemos also argues that current national examinations, being currently based on tests in the end of each cycle and national exams, give considerably more priority to the social impact of school certification, producing, thus, external and irrecoverable information. This is so because, the author continues, such external evaluation does not allow to act upon the learning process of the students under evaluation (because it does not allow retroactive actions) and, consequently, being of no use to work on the need for school's equity. In this sense, these are mechanisms to promote social trust because certifying knowledge but not allowing to convert and transform the outcomes – exams do not improve education quality as they do not allow to act upon the conditions that promote their outcomes. And even if social trust may in some cases improve, this occurs at the cost of quality and equity mechanisms and needs. Thus, national evaluations have become, in this sense, less efficient in terms of resources management, and its consequences in terms of society transformations on equity. Differently, international evaluations have allowed mechanisms to improve the quality of the system, in terms of resources efficiency and access. Indeed, many of the improvement of equity conditions for education access have resulted from OCDE pressures and the common international indicators (IIEES, through their studies and recommendations, though experiencing significant internal resistances).

In Spain, most schooling decisions are taken by the regions or the central government (approximately 43% of decisions in lower secondary education), and about one-quarter of decisions are taken by schools. Regional authorities have responsibility for organizing and delivering education and maintaining schools, and for decisions on funding (including teachers' salaries), on part of the curriculum, among others. Targeted capacity-building at these levels to support decision-making and implementation of these decisions can help to promote better results. School Councils (*Consejos Escolares*),

which formally participate in decision-making in schools, include representatives of the teaching and student body, the town council, parents (slightly more than a tiny ten percent of them vote for selecting their representatives) and non-teaching staff. In vocational training schools, the councils might include representatives from labour institutions or employers' organizations.

In Italy, despite the Law n. 59 /1997 which ruled the school autonomy, schools have little autonomy over matters such as hiring teachers, dismissing teachers, formulating the school budget and deciding its allocation within the school³⁴, comparing to other OECD countries. According to the Eurydice Report (2009), if we consider the autonomy of schools in accessing and utilizing public funding, Italian schools report a full autonomy concerning the purchasing of ICT technologies and in the operating expenses, but a total lack of autonomy concerning properties purchasing. On the contrary, Italian schools benefit from a wide autonomy in accessing and utilizing private funding, that can be allocated to many functions such as acquiring goods, hiring teaching staff for extra-curricular activities. Instead, schools benefit from a full autonomy in defining the optional curriculum, even if teachers are not alone in this decision-making process but they are expected to work in team with the rest of the teaching staff and to follow local and regional guidelines. Schools are instead fully autonomous in terms of educational methods and schoolbooks choice.

Together with the raising of the school autonomy in Europe, the need for accountability has increased as well. Nevertheless, accountability practices in Italy are still very rare and backward, leaving the country at the margins of this tendency towards external evaluation systems. Thus, schools in Italy are not compelled to account for their own work in front of external actors, even if they are strongly fostered in promoting internal evaluation.

In Greece, the internal evaluation of every department is followed by an external organization. The relevant committee of the external evaluation is comprised by academics from universities abroad, who understand the Greek language. All the

³⁴ 86% of students attend schools whose principals report that only regional and national education authorities have the responsibility for selecting teachers to employ (compared to 24% across OECD countries). Furthermore, 78% of students in Italy attend schools whose principals report that only regional and national education authorities are responsible for firing teachers.

relevant reports are published on the internet page of the institution (see www.hqaa.gr). The criticism addressed to such a concentrated system is manifold. It is worth noting that the law of 1985, which was considered a landmark for introducing democratic structures of governance in schools, permits various civil society and professional organisations (e.g. farmers', workers', middle business' etc.) to write reports or recommendations addressing them to the education authorities. This seemingly democratic measure, means according to some authors that actually no one has the responsibility to do so (see Kantzara 2001: ch. 3).

A significant part of running an education system is to have statistical information. Availability of statistical data has been improved considerably *after 2012*; part of it is due to the measures issued conforming to the 'Memorandum of Understanding' agreement with the troika which promotes 'transparency' in the public sector. Still statistics are not up to date on a number of subjects, and most notably on education.

It was thought that one of the main mechanisms to combat corruption and facilitate public control over finances and other aspects has been to make public every decision made by public authorities; for this purpose there is a site on the internet, called '*diaygeia*' (transparency). This measure has already bared some fruits as very often one can read articles that judge public spending, but this is another issue and we put aside for the moment.

Final remarks

In this paper, we sketched the major changes in the education assessment system in Portugal, Spain, Italy and Greece, during the last decade. Our main idea is that, in spite of significant divergences between countries, there was in all of them a reinforcement of the management systems of monitorization and assessment, based on a restrict concept of quality and hardly able to generate an effective improvement of quality of teachers' and students' work. As a compensation for huge cuts in public education budgets, such mechanisms has generated an intensification and standardization of

teachers' and students' work, focused on a limited set of skills and only assessed in the short-term.

Still, our analysis does not confirm the homogeneity thesis. Actually, assessment systems carried out in these countries are clearly distinct and although international pressures and trends were important in their development, they are following different models.

Besides, especially in Greece, but in some measure in the other countries too, the austerity policies blocked the economic and political conditions to settle consistent and constructive assessment programs, not only because such they require a considerable investment, but also because in a such a context they are not able to reward and to support school agents, but they are conceived as a tool to stress and to dismiss them.

References

- Afonso, A. J. (2001). Políticas contemporâneas e avaliação educacional. In Lima, L & Afonso, A. J. (eds.), *Reformas da Educação Pública: Democratização, Modernização, Neoliberalismo*, Porto, Afrontamento, 111-127.
- Archer, M. (1979). *Social origins of educational systems*. Londres: Sage.
- Ball, S. (1998). Big policies/small world: an introduction to international perspectives in education policy. *Comparative Education*, 34 (2), pp. 119-130.
- Carnoy, M., & Rothen, D. (2002). What does globalisation mean for educational change? *Comparative Education Review*, 46(1).
- EACEA (2013). *Key data on teachers and school leaders in Europe. 2013 Edition*. Brussels: EACEA.
- EACEA (2015). *Assuring quality in education: Policies and Approaches to School Evaluation in Europe*. Brussels: EACEA.
- Enguita, M. (2001, 2007). *Educação e transformação social*. Mangualde: Edições Pedago.

Martins, Susana da Cruz (2012), *Escolas e Estudantes da Europa: Estruturas, Recursos e Políticas de Educação*, Lisboa, Editora Mundos Sociais.

Petitot, A. (1982). *Production de l'école, production de la société*. Genebra: Droz.

Popkewitz, T. (1991). *Sociología política de las reformas educativas: el poder/saber en la enseñanza, la formación del profesorado y la investigación*. Madrid: Morata.

Sallis, E. (2005). *Total Quality Management in Education*. 3rd edition. London: Kogan Page.

Teodoro, A. (org.) (2008). *Tempos e andamentos nas políticas de educação*. Brasília: Liber.

<p>LAS POLITICAS DE LA “CALIDAD EDUCATIVA” EN EUROPA DEL SUR Y SUS IMPACTOS EN LAS VIDAS DE ESTUDIANTES Y MAESTROS</p> <p>Pedro Abrantes Universidade Aberta & CIES-IUL</p> <p>Sofia Amândio CIES, Instituto Universitário de Lisboa</p> <p>Susana da Cruz Martins CIES, Instituto Universitário de Lisboa</p> <p>João Sebastião CIES, Instituto Universitário de Lisboa</p> <p>Rafael Feito Alonso FCPyS, Universidad Complutense de Madrid</p>	<p>Conferencia Ibérica de Sociología de la Educación</p> <p>FCSH-UNL Lisboa, 9-10-11 de Julio de 2015</p>
--	---

CUESTIONES DE PARTIDA

- El peso creciente de la gestión, evaluación y calidad en los sistemas de enseñanza, en diferentes partes del mundo – la influencia de poderosos organismos internacionales

Cuestión de partida: ¿hacia un modelo global?

La importancia de una comparación entre países:

- ¿los mismos modelos?
- ¿los mismos impactos?
- ¿resultados convergentes?
- ¿qué procesos de (re)contextualización y traducción?

Portugal, España, Italia, Grecia:

- Similitudes culturales y demográficas
- Integración en la U.E.
- Severidad de la crisis económica (2008-...)
- Diferencias importantes (negligenciadas en el debate europeo)

ESTUDIO

4 países

Proyecto
DESAFÍOS EDUCATIVOS EN EUROPA DEL SUR: EQUIDAD Y
EFICIENCIA EN TIEMPOS DE CRISIS
Duración: 2013-2015

Coordinación JOÃO SEBASTIÃO (CIES-IULISBOA)
Equipo 10 investigadores en Portugal, Rafael Feito
(España), Vasiliki Kantzara (Grecia) y Maddalena Colombo
(Italia)

Objetivo general
Analizar y comparar los efectos de la crisis económica
reciente en los sistemas de enseñanza en los cuatro
países

Metodología
Análisis de políticas, legislación y indicadores
Entrevistas a expertos del campo educativo

EL ESTUDIO

LOS TESTES A LOS ESTUDIANTES COMO MEDIDA DE LA CALIDAD EDUCATIVA

- El impacto profundo de los informes PISA en los debates públicos (no siempre en las políticas)
- Resultados del PISA entre 2000 y 2012: estabilidad de España en la media y de Grecia un poco abajo, evolución positiva de Portugal y Italia hacia la media > convergencia con el centro y norte de Europa
- Refuerzo de las pruebas nacionales, sobre todo en Portugal y en Italia > críticas: estrés, jerarquización, exclusión

LA EVALUACIÓN DE MAESTROS COMO MEDIDA DE LA CALIDAD EDUCATIVA

- Portugal: el intento fallido en 2009; regreso a un modelo de evaluación administrativo y con impactos incipientes
- España: los límites de la evaluación realizada por los directores de centro
- Italia: no hay un sistema de evaluación de los maestros
- Grecia: nuevo sistema de evaluación de los maestros (2011), de acuerdo a los nuevos marcos de la calidad y de la gestión, con fuerte oposición del profesorado

LA EVALUACIÓN DE ESCUELAS COMO MEDIDA DE LA CALIDAD EDUCATIVA

- Portugal: sistema más completo (desde 2005), aunque con efectos poco claros en las políticas públicas
- España: sistema asociado a la inspección, sin involucrar las comunidades y sin visibilidad pública de los resultados
- Italia: proyecto piloto innovador pero involucrando pocas escuelas y todavía sin impacto en las políticas
- Grecia: no existe

- peso creciente de los discursos de la calidad, gestión y evaluación
- La primacía de las pruebas escritas a los alumnos: el vértigo del rechazo, reprobación y exclusión
- La incapacidad de involucrar al profesorado: del miedo a la resistencia
- intensificación de los procesos de evaluación, pero con modelos muy diversos (no hay convergencia)
- La crisis y las políticas de austeridad han impulsado, pero también dificultado, la implementación de estas políticas

CONCLUSIÓN

Tendencias en
Portugal, España,
Italia y
Grecia

Power point presentations

**Educational challenges in Southern Europe. Equity and efficiency in a time of crisis,
CIES-IUL**



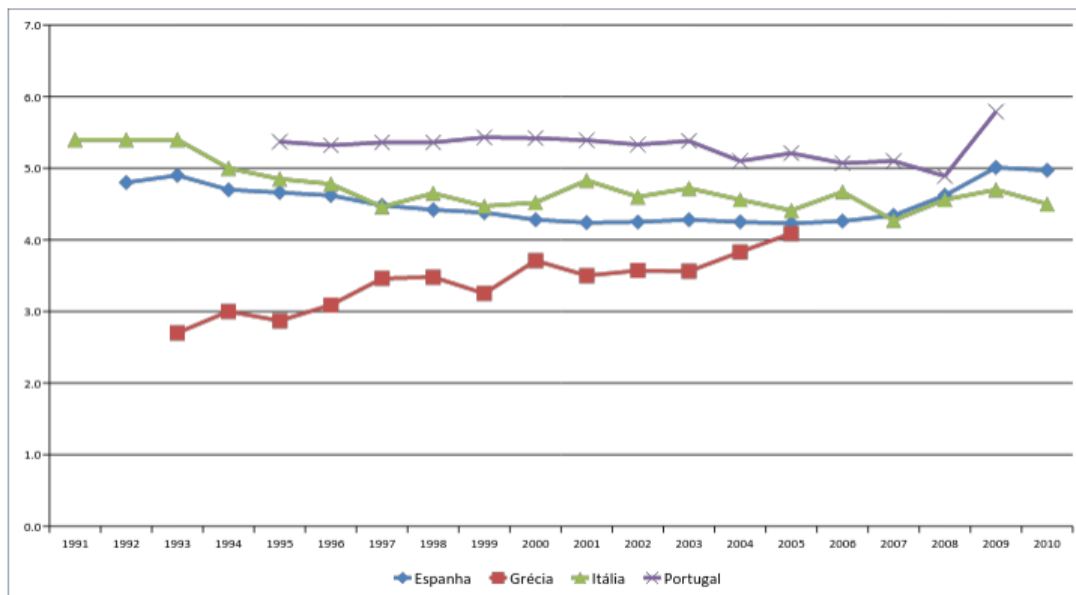
Conjunto de atributos económicos, sociais e políticos similares:

- experiências autoritárias recentes,
- estados providência pouco desenvolvidos
- economias marcadas por problemas de produtividade, competitividade e qualificações.
- a crise económica tem tido efeitos particularmente duros nestes países.

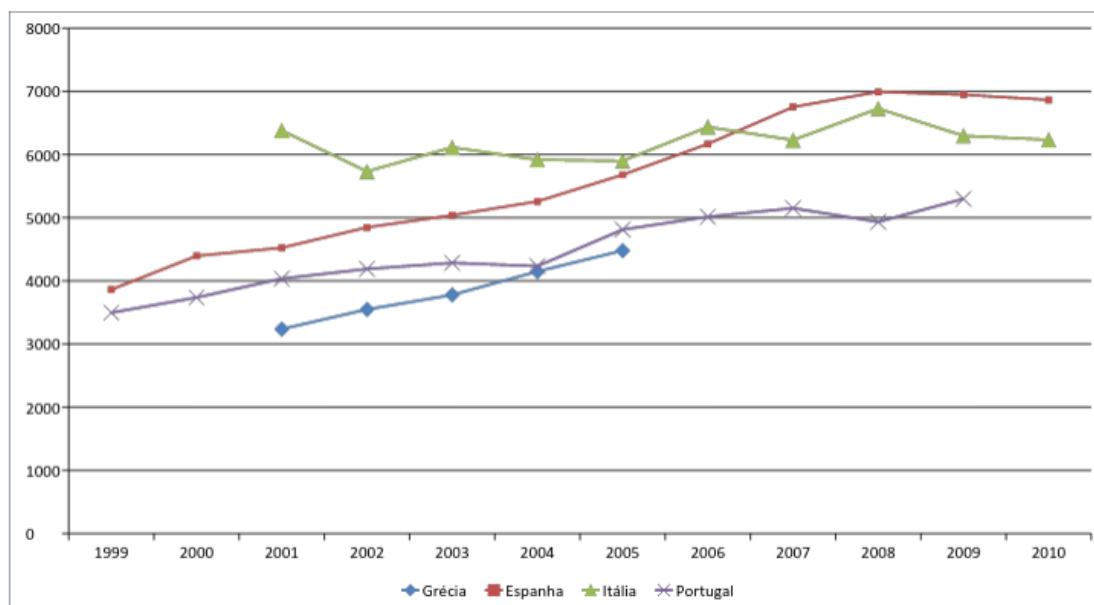
Ponto de partida:

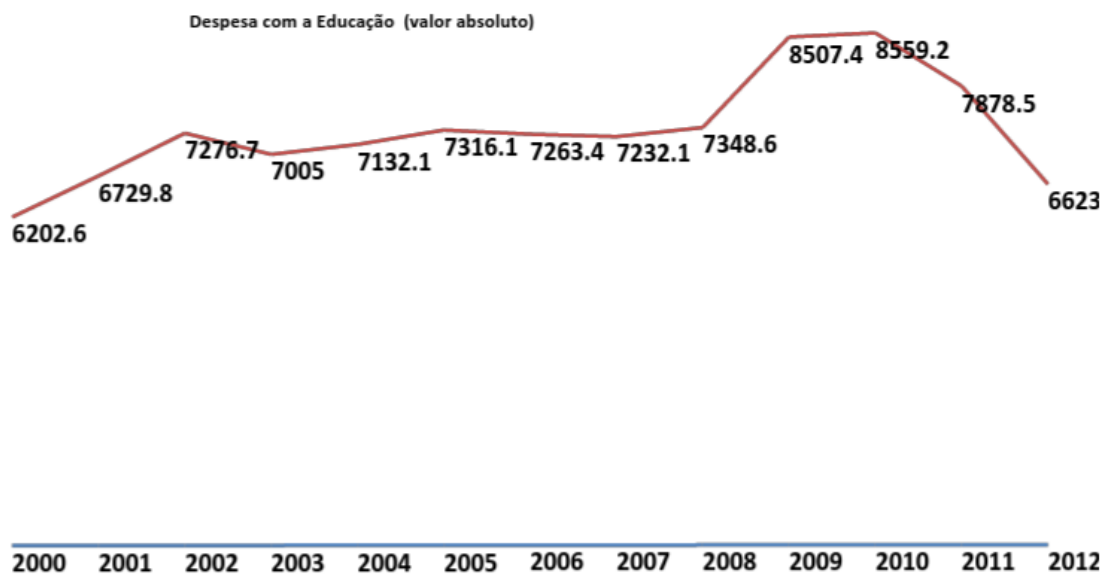
- Quais os impactos da crise na concretização dos objetivos para os sistemas de educação e formação e para o desenho desses sistemas, e quais as consequências desse impacto no contributo da educação para a superação da crise?

Despesa em educação com % do valor do PIB



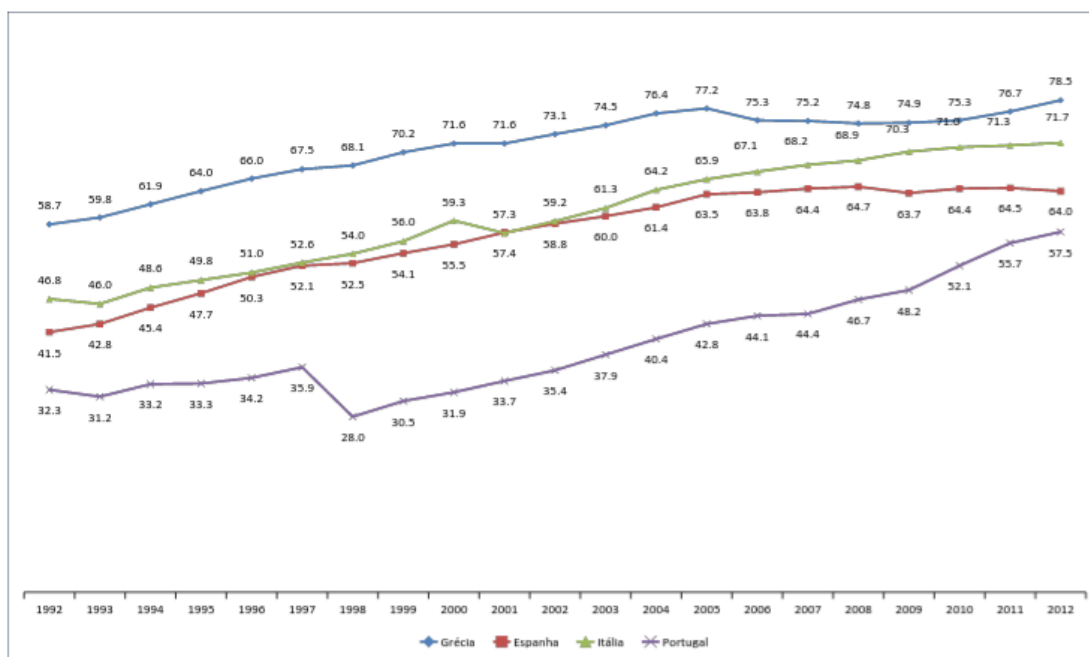
Despesa anual em instituições de ensino por aluno (%)



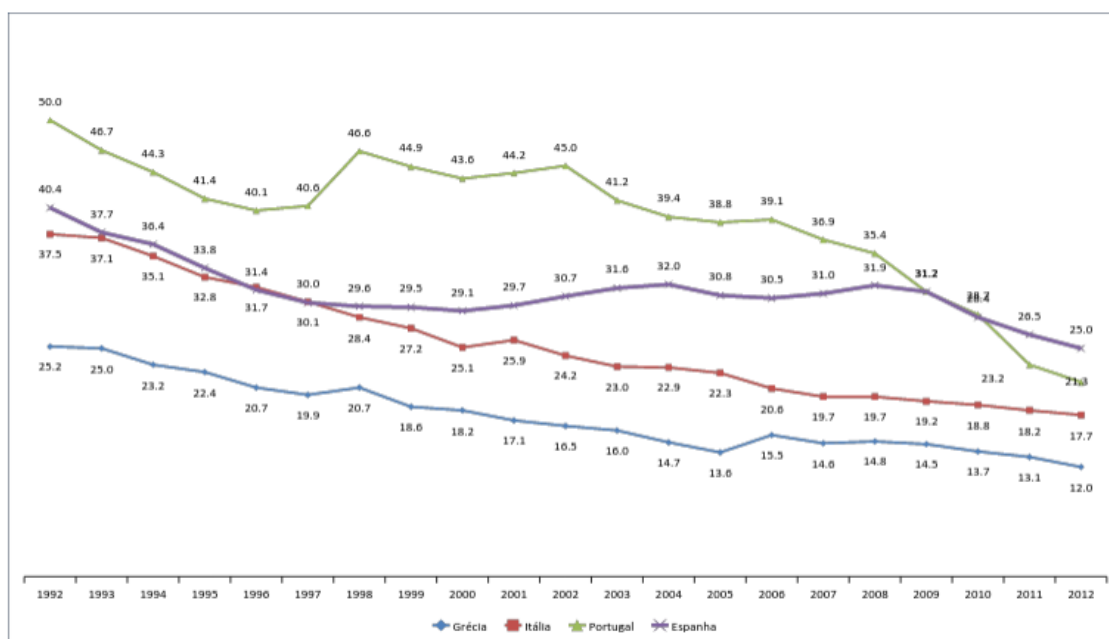


Fonte: Pordata

Evolução da população com o ensino secundário e/ou ensino superior (%)



Evolução da população entre 18 e 24 anos com o ensino básico que não está no sistema de ensino nem noutra formação (ou abandono escolar) (%)



População entre 25 e 64 anos que participou em ações de educação e formação (%)

	1992	2010
Portugal	3,0	6,2
Espanha	3,4	10,8
Itália	3,0	6,2
Grécia	-	-

Com a participação de:

João Sebastião; Luís Capucha;
Susana Martins; Patrícia Ávila;
Pedro Abrantes; Maria Álvares;
Vassiliki Kantzara; Maddalena Colombo ;
Rafael Feito-Alonso

ESA 2013, Torino

11th Conference: *Crisis, Critique and change*

**Educational Challenges in Southern
Europe. Equity and efficiency in a
time of crisis**

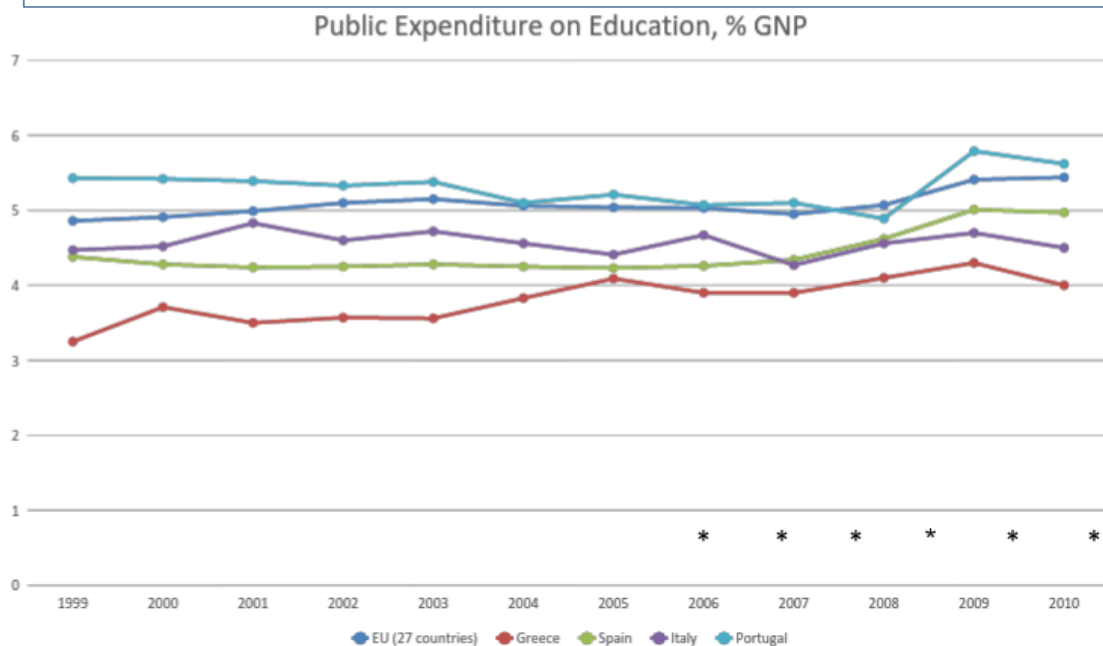
João Sebastião
Luís Capucha



Set of similar attributes - economic, social and political basis:

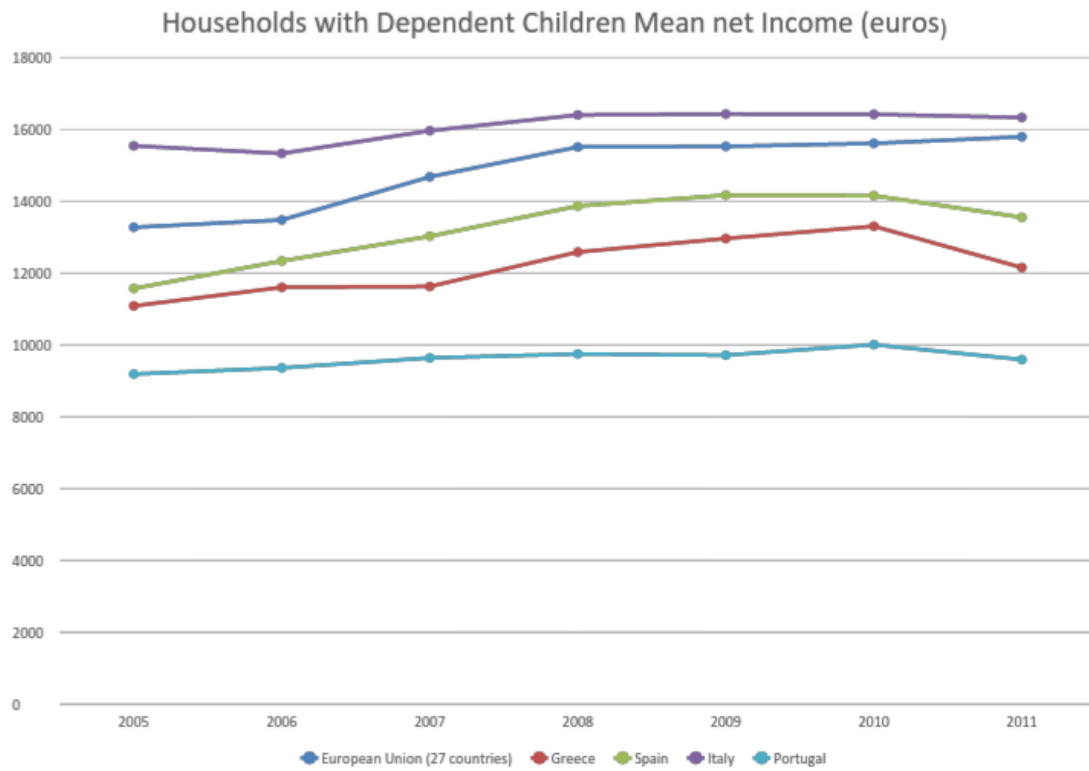
- Relatively recent right-wing authoritarian experiences
- Economies with structural problems of productivity and competitiveness
- Underdeveloped welfare states
- The crisis has been particularly hard to southern countries

Education Expenditure



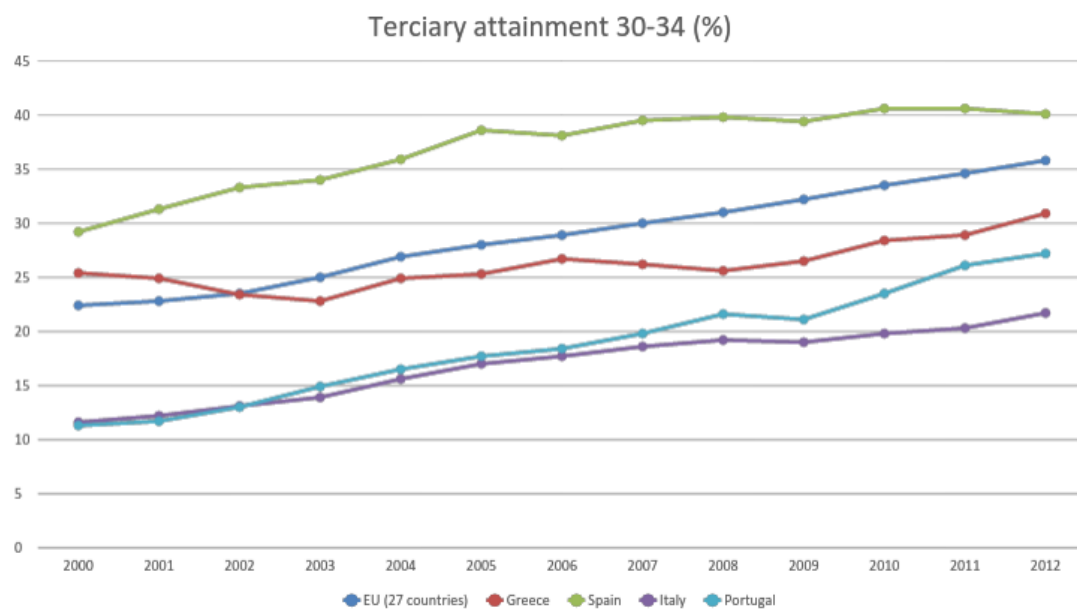
Data source: Eurostat

*Data provided by National Statistical Service of Greece and calculus made by CESE team.

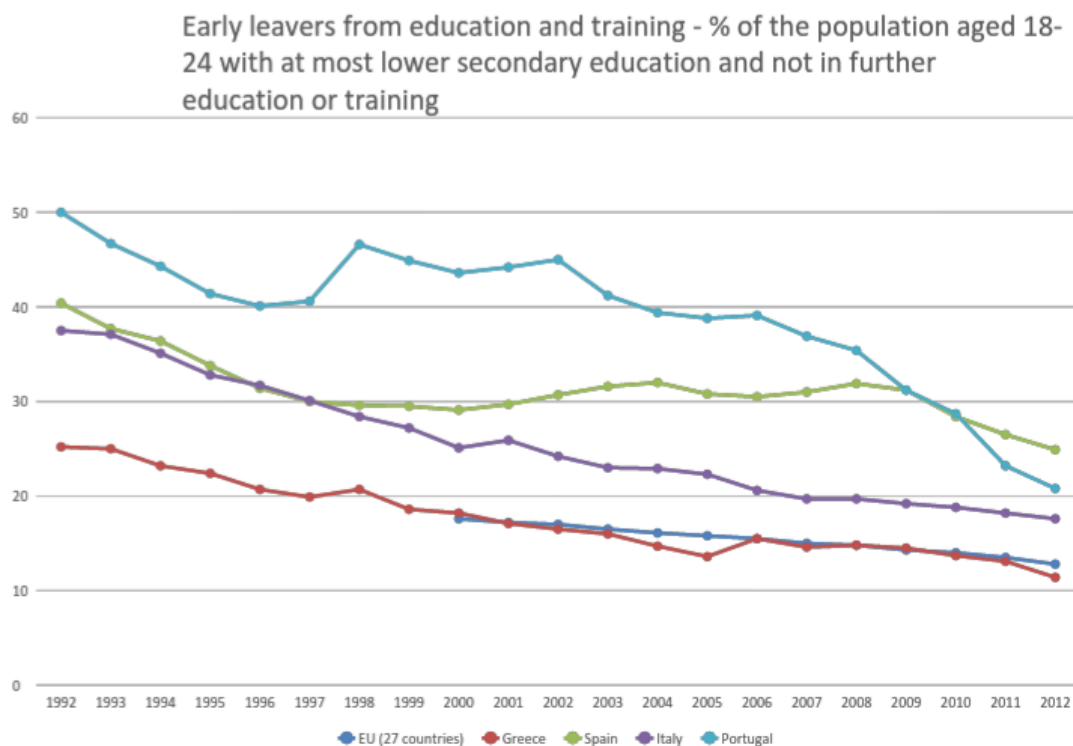


Data Sources: Eurostat / National Entities; European Statistics on Income and Living Conditions (EU-SILC).

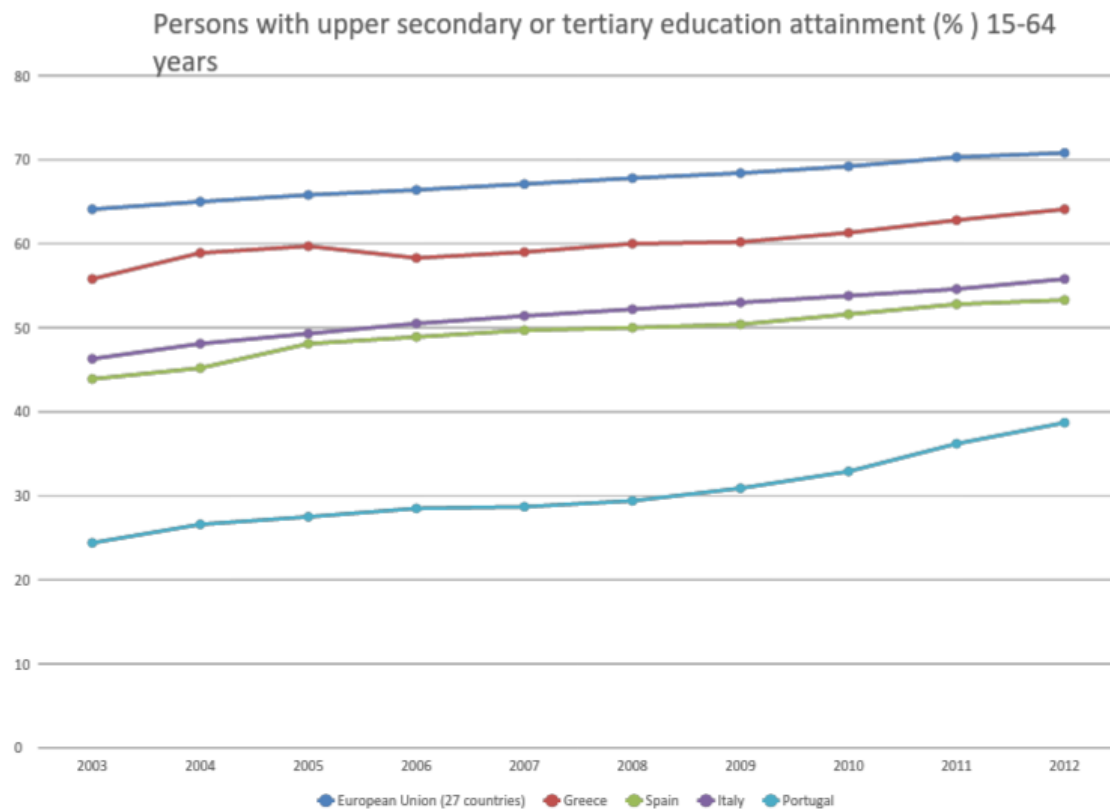
Indicators on Education achievements



Data Source: Eurostat, Europe 2020 Indicators



Data Source: Eurostat, Europe 2020 Indicators



Political choices in Portugal and their impacts on:

Adult education

- Termination of the “Novas Oportunidades” programme and lack of alternative effective measures.

Teachers

- Significant reduction in numbers of teachers
- Termination of integrated training programmes such as the “Plan of Action for Mathematics”.

Student support measures and scholar success promoting

- Termination of extracurricular areas such as “Estudo Acompanhado” – “Accompanied study”
- Increasing the number of students per class.
- Worst results at National Exams nevertheless detecting real improvements on International Students Assessments - for example considering the last results of PISA.

Funding options

- Introduction of mandatory national exams at the end of the first and second cycles of basic education (9 year-olds & 11 year-olds)
- Assymetrical treatment on funding regarding private sector education (“association contracts”)

I Conferência Ibérica de Sociologia da Educação – Lisboa, 2015

**I Conferência
Ibérica de Sociologia da Educação
Lisboa, 9 a 11 de Junho 2015**

A Educação na Europa do Sul

Educação de Adultos no Sul da Europa em contexto de crise: ciclos políticos, adaptação ou rutura?

**Luís Capucha; João Sebastião;
Rita Capucha; Ana Amândio; Maria Álvares**



Ed. ISCTE: Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 038 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: <http://cies.iscte.pt>

Projeto Europeu: ***Desafios Educativos na Europa do Sul. Equidade e Eficiência em tempos de crise***

Objetivos da comunicação

Identificação das práticas em Educação de Adultos no sul da Europa, partindo de uma análise diacrónica de indicadores de resultados e das políticas implementadas no Sul, mantendo como principais eixos de análise:

- Diferenças e regularidades encontradas entre os 4 países do Sul em estudo: Portugal, Espanha, Itália e Grécia;
- Impactos surgidos com a crise financeira internacional - Da implementação dos programas de intervenção (Portugal/Grécia) e de ajuda financeira externa (Espanha/Itália) e consequentes, ou não, orientações políticas;
- O caso de Portugal – Da iniciativa Novas Oportunidades ao “colapso” da política de Educação de Adultos

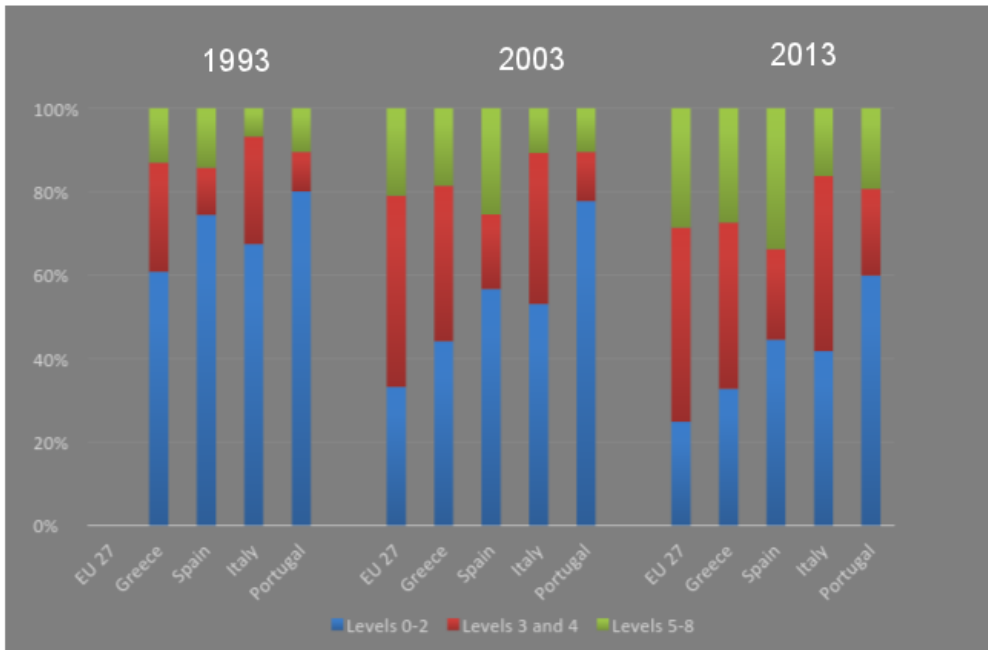


CENTRO DE INVESTIGAÇÃO
E ESTUDOS DE SOCIOLOGIA
Instituto Universitário de Lisboa

CENTRE FOR RESEARCH
AND STUDIES IN SOCIOLOGY
University Institute of Lisbon

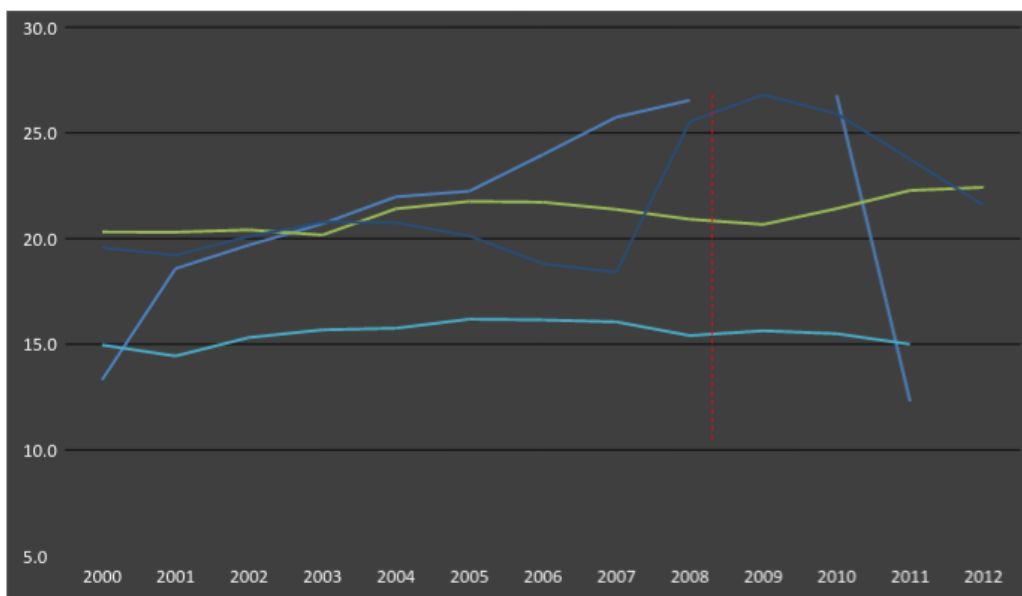
Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

1. Estrutura da Qualificação no Sul da Europa (25-64 anos)



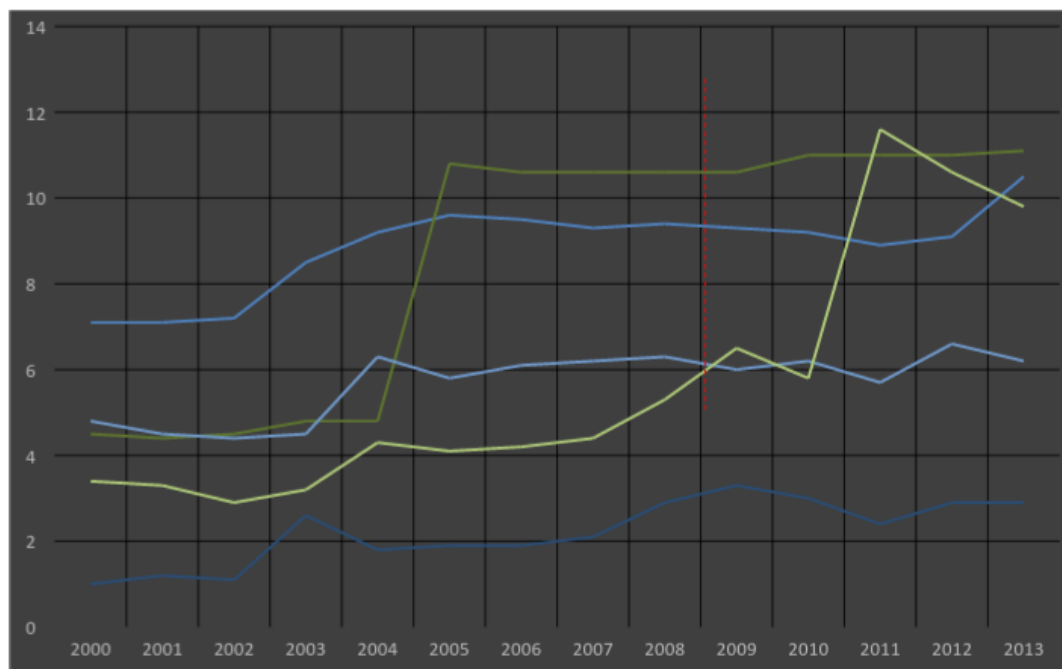
Fonte: Eurostat

Percentagem de adultos (+25 anos) no Sistema de Ensino (Todos os níveis)



Fonte: Eurostat

Taxa de Participação em Educação e Formação (últimas 4 semanas /25-64 anos)



2. Educação de Adultos no Sul da Europa – resultados e políticas

1. Distintos resultados:

Espanha e Portugal a liderarem, com taxas de participação mais elevadas, aproximando-se do contexto europeu; Itália e Grécia – países com estrutura de qualificação mais próximas do quadro europeu - a apresentarem resultados menos animadores, onde a Grécia detinha, no último ano, a taxa mais baixa da Europa 27 (2,9%)

Portugal a constituir o único país onde se verifica uma descida mais drástica nos resultados, demonstrando que as opções políticas tomadas a partir de 2011 reverteram a tendência inicial e voltaram a colocar a Educação de Adultos fora das prioridades em educação.

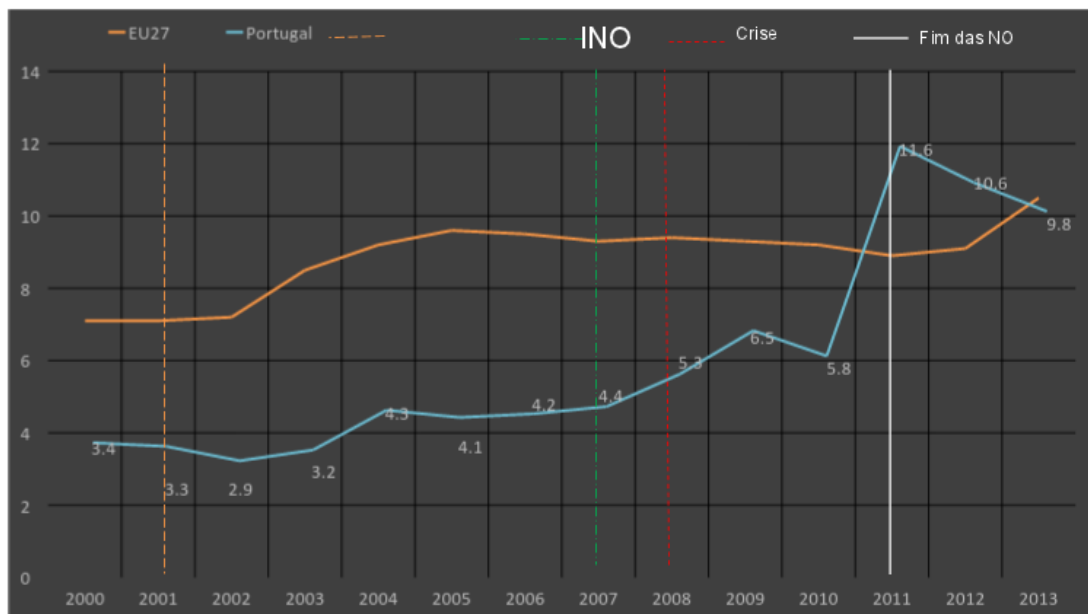
2. Que as políticas no Sul da Europa seguiram essencialmente dois paradigmas de orientação:

a) Educação do tipo “Popular”, privilegiando a vertente da qualificação – Portugal com o desenvolvimento da Iniciativa Novas Oportunidades, posteriormente desmantelada.

b) Educação do tipo “escolar”, privilegiando a vertente do ensino – Espanha fortificou a “escolaridade secundária obrigatória”, desenvolvendo, entre outros, o ensino à distância; em Itália são criados os “centros territoriais permanentes”, com ofertas formais, substituídos recentemente pelos “centros provinciais de Educação de Adultos”; Grécia – essencialmente com as “escolas de segunda oportunidade”, existindo 57 em todo o território.”

3. O caso Português. Rutura, ou adaptação?

Taxa de Participação de Adultos (25-64) em Educação e Formação



CIES IUL

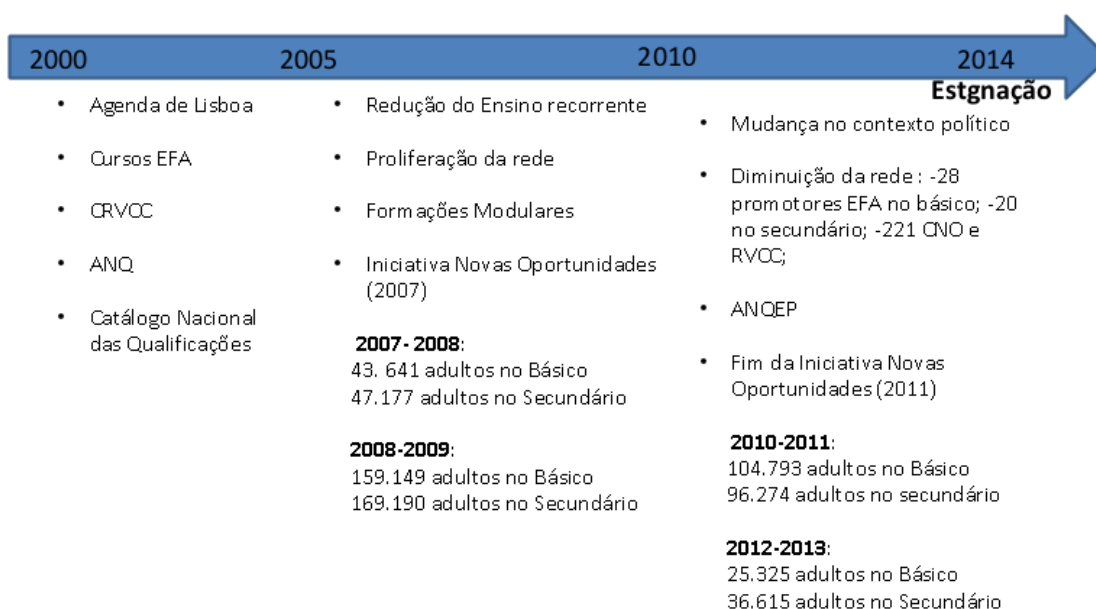
CENTRO DE INVESTIGAÇÃO E ESTUDOS DE SOCIOLOGIA Instituto Universitário de Lisboa

CENTRE FOR RESEARCH AND STUDIES IN SOCIOLOGY University Institute of Lisbon

Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

Fonte: Eurostat

3.1 Políticas de Adultos, “Novas Oportunidades”: adaptação, ou rutura?



CIES IUL

CENTRO DE INVESTIGAÇÃO E ESTUDOS DE SOCIOLOGIA Instituto Universitário de Lisboa

CENTRE FOR RESEARCH AND STUDIES IN SOCIOLOGY University Institute of Lisbon

Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

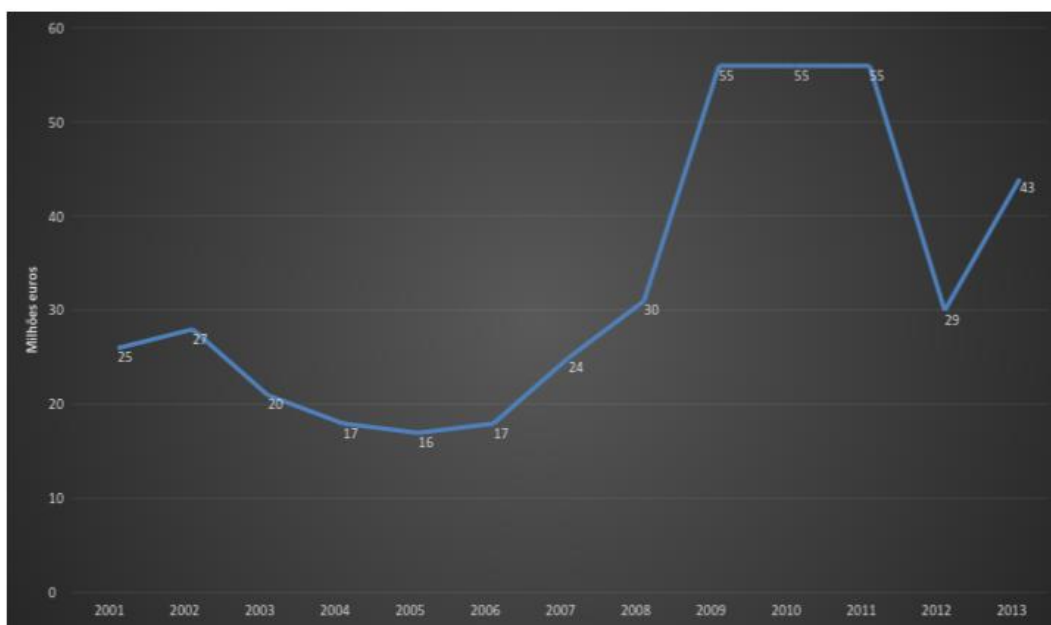
Número de Adultos Diplomados no Básico por modalidade:

	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013
Recorrente	2091	1597	11143	889	142	142	74	36	2
EFA	-	-	-	10295	8359	13634	12087	8729	4294
RVCC	-	-	-		75935	70147	41342	24494	7841

Número de Adultos Diplomados no Secundário por modalidade:

	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013
Recorrente	12162	13139	14590	8231	5802	5031	4665	3779	4303
EFA	-	-	-	376	11763	16269	18517	15130	8932
RVCC	-	-	-	-	44916	47173	18997	11451	10357

3.2. Despesa do Estado em Educação de Adultos: adaptação, ou rutura?



Fonte: DGPEF-MEC

Notas Conclusivas

- A crise trouxe mudanças consideráveis na prática política e nos resultados: Portugal, de entre os países do Sul, foi aquele onde claramente se verificou uma rutura na orientação política e nas prioridades educativas, cortando-se com princípios anteriores norteadores da convergência e do crescimento em matéria da qualificação dos adultos e da população ativa. O fim das Novas Oportunidades é exemplo disso, bem como a descida nos resultados analisados.
- A INO foi um programa sem paralelo no contexto europeu, que impulsionou de forma massificada a qualificação de adultos e que retomou uma orientação do tipo “popular”. Entre 2006 e Julho de 2011, 1.568.490 adultos (cerca de 28% da população ativa) tinham-se inscrito na INO, dos quais, 424.739 haviam obtido certificação.
- Em Espanha parece ter sido o próprio contexto de crise (e o aumento do desemprego) a impulsionar a Educação de Adultos, havendo registo do aumento de indivíduos envolvidos com maior evidência, no âmbito da ESO (Escolaridade Secundaria Obrigatória – oferta de componente formal), nos “Centros de educación de Adultos” e em ações de formação. Os resultados não sofreram modificações, antes apontam para o seu crescimento e desenvolvimento.
- Por seu turno, Grécia e Itália, apresentam piores resultados em Educação de Adultos, particularmente nas componentes não formais, detendo, contudo, uma estrutura de qualificação também com melhores resultados. Os indicadores demonstram que a Educação de Adultos cresce a ritmo mais desacelerado, indiciando alguma incipiência na política de educação de adultos e aprendizagem ao longo da vida. A orientação da oferta de adultos segue essencialmente o paradigma da “segunda oportunidade” e da componente de ensino.

The RN10 Sociology of Education Mid-Term international Conference - Lisbon, 8 and 9 September 2014

**The RN10 Sociology of Education Mid-Term international
Conference - Lisbon, 8 and 9 September 2014**

**Education and Citizenship:
theoretical issues, policies and practices**

**Education in Southern Europe: from
convergence to the crisis and austerity.**

***Project: Educational Challenges in Southern Europe. Equity and efficiency in
a time of crisis***

**Luís Capucha, João Sebastião, Susana Martins, Raquel Matias, Rita
Capucha, Maria Álvares, Alexandre Calado**



Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

1. Convergence: Southern Europe, school attainment and educational systems performance

The convergence can be observed in two areas:

1 - School Attainment Dynamics

- Population with tertiary attainment
- Students in vocational areas
- Lifelong Long Learning and adults qualifications

2 - Better Performance of educational systems

- Results on Early School leaving
- Results on PISA



CENTRO DE INVESTIGAÇÃO
E ESTUDOS DE SOCIOLOGIA
Instituto Universitário de Lisboa

CENTRE FOR RESEARCH
AND STUDIES IN SOCIOLOGY
University Institute of Lisbon

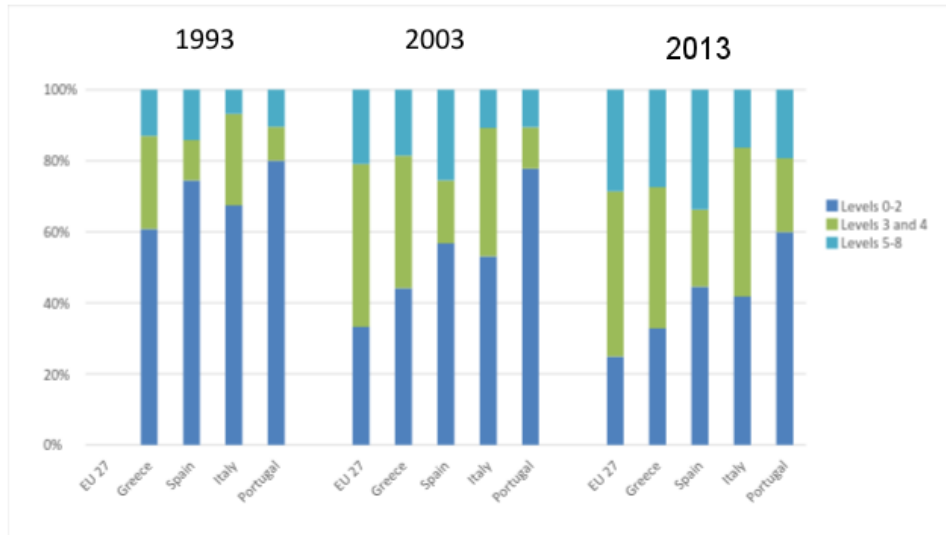
Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

Main conclusions:

1. Southern Europe has a 'historical' backwardness in education, particular concerning the qualifications.
2. However, this countries have been engaged in a process of convergence toward European standards.
3. Although the visible approach to European standards, this process occurred differently in southern countries showing there is no evidence to assume the existence of a southern model.

School Attainment Dynamics

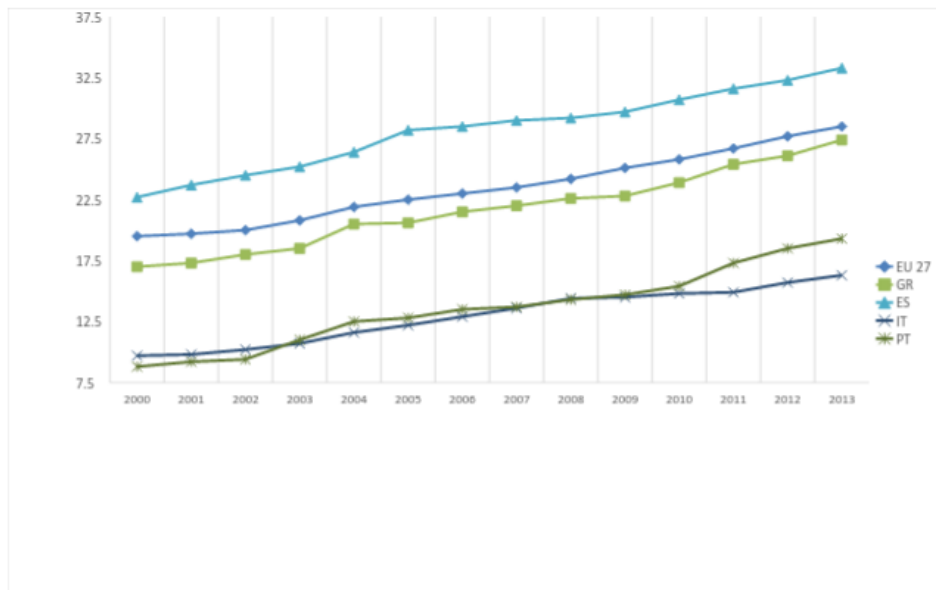
Population (aged 25-64) Educational Levels



Source: Eurostat

School Attainment Dynamics

Tertiary Attainment



CIES IUL

CENTRO DE INVESTIGAÇÃO
E ESTUDOS DE SOCIOLOGIA
Instituto Universitário de Lisboa

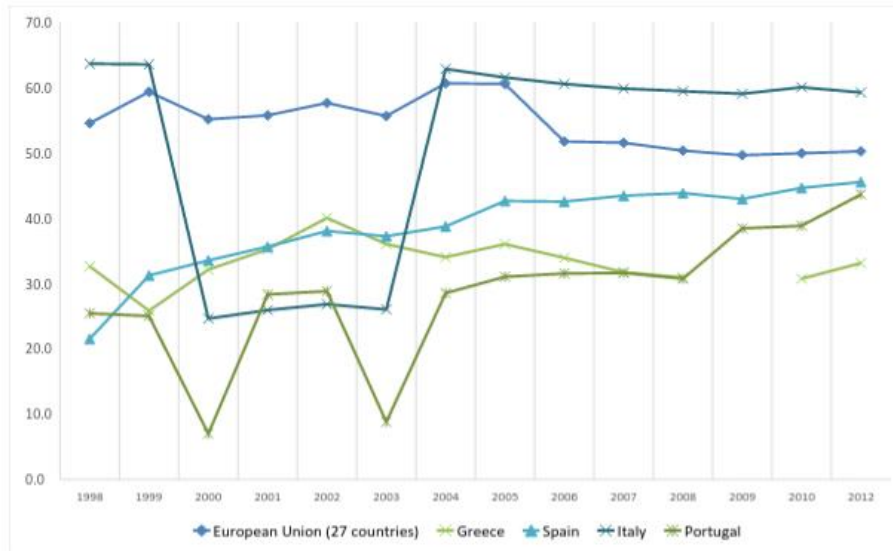
CENTRE FOR RESEARCH
AND STUDIES IN SOCIOLOGY
University Institute of Lisbon

Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

Source: Eurostat



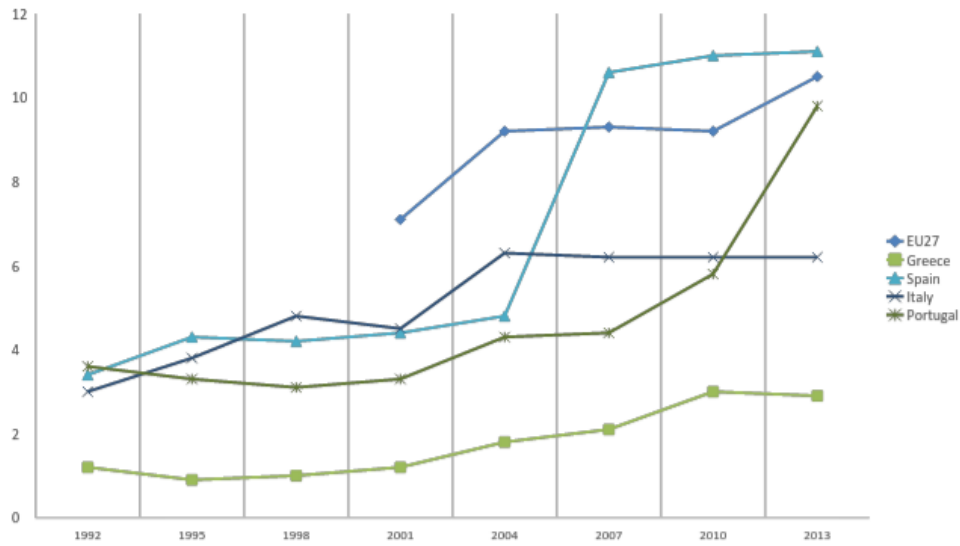
Students at Vocational, level 3



Source: Eurostat



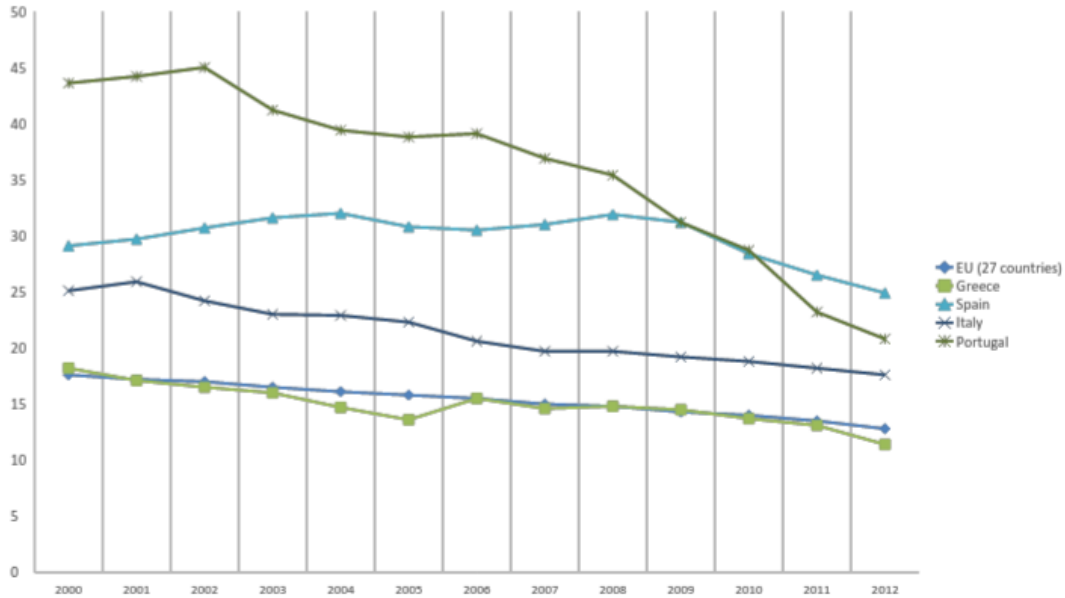
Participation rate in education and training (last 4 weeks)



Education System Performance



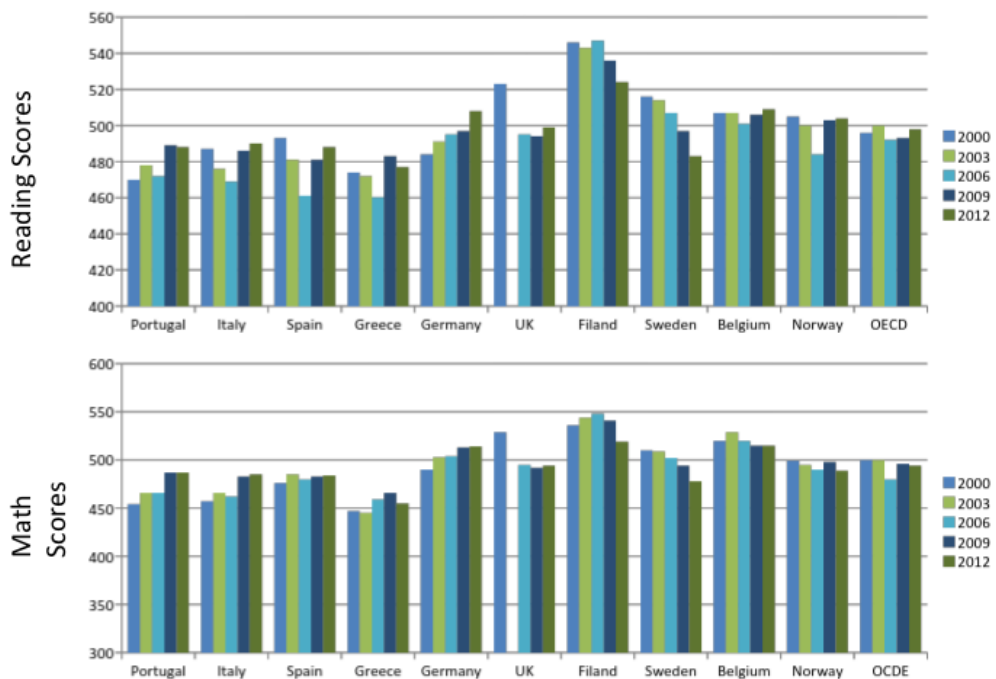
Early School Leaving



Source: Eurostat

Education System Performance

PISA Results



2. Education and constructing European Union

1. Convergence was mainly a national effort. European Union has had only a subsidiary role.

2. In fact, there is no European policy for education and training, i.e., for the investment in citizens' qualification.

2.1 Education has an important role concerning the citizenship promotion, and considering EU "project", it could be an important key toward the states union (with advantages in economical, social and political sectors).

3. Instead, EU institutions are investing on austerity measures which is having negative impacts at national education systems.

3.1. European Commission is functioning on a 'schizophrenic' basis, alternating between several recommendations (educational benchmarks) and the promotion of austerity and "cuts" on education resources.

3- Southern Europe: from convergence to labeling – crisis and austerity measures.

1.Despite the several references of “education” has an economical and financial “lever”, the convergence that we witnessed has been interrupted.

2.This means that a new political cycle can be perceived not only in southern Europe but in all European territory. ★

3.In a context of crisis, Southern countries visibility are shifting from countries with clear convergence path to labelled ones (for example PIGS), as they are referred as countries with major “responsibilities” on this financial crisis.

4.As we demonstrate, this labels have no evidence and indeed this countries “spent” real amounts of money, but mainly on this convergence effort.

IV Colóquio Luso-Brasileiro de Sociologia da Educação Porto, 19 a 21 de Junho 2014

IV Colóquio
Luso-Brasileiro de Sociologia da Educação
Porto, 19 a 21 de Junho 2014

Normatividade(s)
*Lógicas de justiça, equidade e excelência
escolar*

CRISE E EQUIDADE NOS SISTEMAS
EDUCATIVOS DO SUL DA EUROPA:
tendências de evolução

**João Sebastião; Susana Martins; Luís Capucha;
Raquel Matias; Rita Capucha; Pedro Estevão**



Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

Projeto Europeu: *Desafios Educativos na Europa do Sul. Equidade e Eficiência em tempos de crise*

Objetivos da comunicação

Contribuir para identificar e situar no tempo as consequências para a equidade e igualdade de oportunidades educativas e potenciais inflexões na condução de políticas educativas resultantes:

- Do deflagrar da crise financeira internacional
- Da implementação dos programas de intervenção (Portugal/Grécia) e de ajuda financeira externa (Espanha/Itália)



Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel. / phone: +351 217 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: <http://cies.iscte.pt>

Dinâmicas e escolarização no Sul da Europa

Participação no Pré-Escolar: ▶

- * Países do Sul mais elevado que OCDE (94%)
 - * mais baixo Grécia (75%) < Portugal (95%) < Espanha (97%) < Itália (99%)
- em crescimento apenas para Portugal e Grécia

Diplomados no Ensino Secundário: ▶

- * OCDE: +45%, Europa do Sul: crescimento a diferentes ritmos
- * Itália e Grécia: mais elevados do Sul >40%, entre 2010 e 2012
- * Portugal e Espanha: mais baixos do Sul >20%

Diplomados no Ensino Superior: ▶

- * Em crescimento geral, Países do Sul abaixo da OCDE (>25%), excepto Espanha (33%)
- * Itália (16%) < Portugal (19%) < Grécia (27%) < Espanha (33%)

CIES IUL

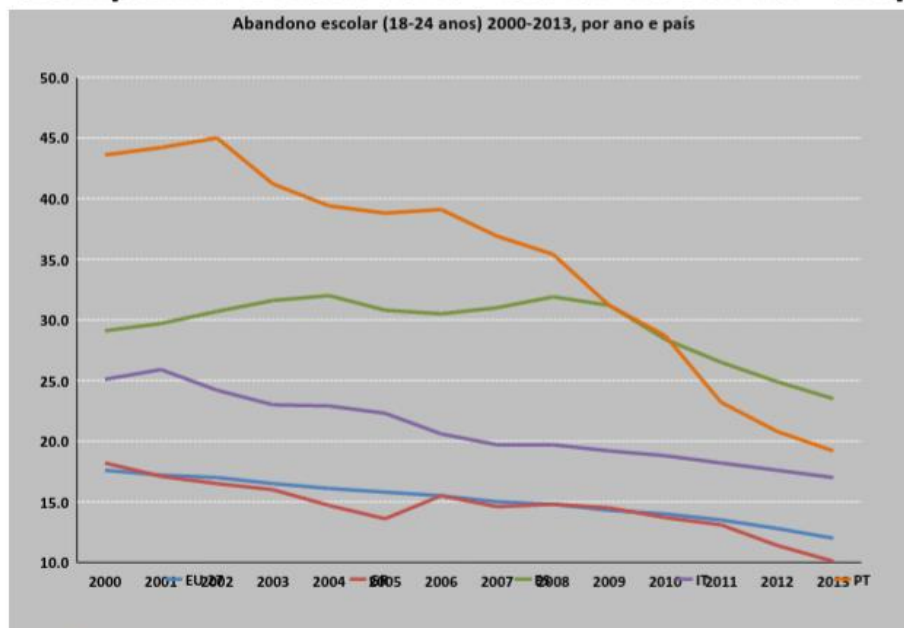
CENTRO DE INVESTIGAÇÃO
E ESTUDOS DE SOCIOLOGIA
Instituto Universitário de Lisboa

CENTRE FOR RESEARCH
AND STUDIES IN SOCIOLOGY
University Institute of Lisbon

Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

Equidade

Desempenho e Abandono Escolar no Sul da Europa



CIES IUL

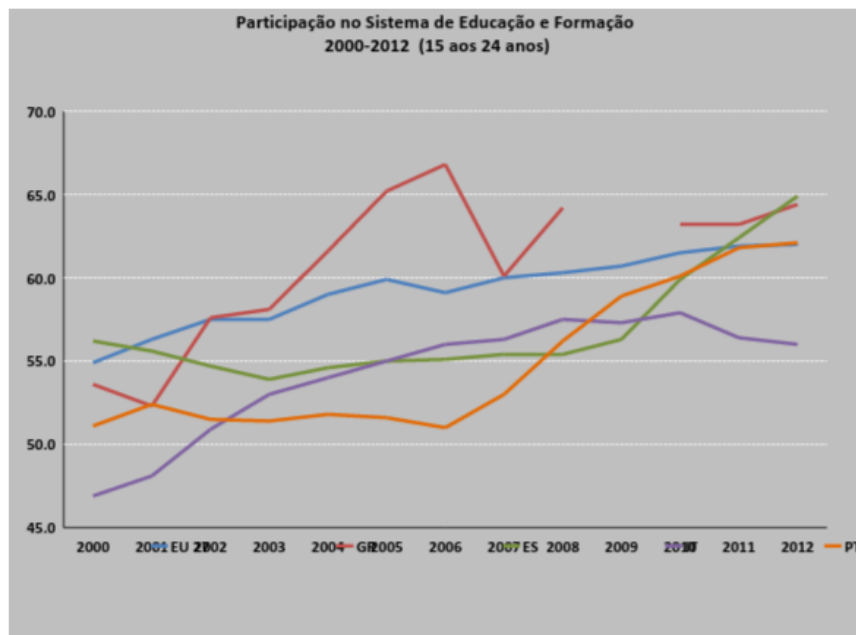
CENTRO DE INVESTIGAÇÃO
E ESTUDOS DE SOCIOLOGIA
Instituto Universitário de Lisboa

CENTRE FOR RESEARCH
AND STUDIES IN SOCIOLOGY
University Institute of Lisbon

Ed. ISCTE, Av. das Forças Armadas, 1649-026 Lisboa - Portugal
tel / phone: +351 210 464 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

Fonte:
Eurostat



Dinâmicas e escolarização no Sul da Europa



Tendências de Equidade, mas...

- Portugal e Itália mostram melhoras nos desempenhos escolares, Grécia piora (PISA) ▶
- Grécia e Portugal é onde mais se observam diminuição de apoios aos alunos ▶
- O Estatuto Socioeconómico continua a ter peso no desempenho escolar. Nos países do Sul da Europa Portugal é o que apresenta maiores desigualdades, e o inverso em Itália (PISA) ▶

Tendências de Equidade, mas...

- Aumento da participação na Educação para Adultos 
- Aumento das diferenças no desempenho entre alunos de origem imigrante no geral e alunos de origem não-imigrante (PISA) 

Cenários possíveis

- Redução significativa do ritmo de participação no Sistema de Educação e Formação
- Aumento das desigualdades internas e entre países
- Inversão das tendências de convergência face à média UE/OCDE

**12th Conference of the European Sociological Association DIFFERENCES,
INEQUALITIES AND SOCIOLOGICAL IMAGINATION RN10 - Sociology of Education
Prague, 25th to 28th August 2015**

12th Conference of the European Sociological Association DIFFERENCES, INEQUALITIES AND SOCIOLOGICAL IMAGINATION
RN10 - Sociology of Education Prague, 25th to 28th August 2015

CRISIS AND EQUITY IN SOUTHERN EUROPE'S EDUCATIONAL SYSTEMS

Tendencies and evolution

Project ECSE PTDC/IVC-SOC/5079/2012 (2013-2015)

- Coordinator: João Sebastião (CIES-IU Lisboa)
- Advisors: Rafael Feito (Spain), Vasiliki Kantzara (Greece) and Maddalena Colombo (Italy)
- Portuguese Researchers: Luís Capucha, Susana da Cruz Martins, Sofia Lai Amândio, Rita Capucha, Raquel Matias, Pedro Abrantes, Patrícia Ávila, Maria Álvares, Pedro Estevão, Alexandre Calado

CIES IUL
CENTRO DE INVESTIGAÇÃO
E ESTUDOS DE SOCIOLOGIA
Instituto Universitário de Lisboa

CENTRE FOR RESEARCH
AND STUDIES IN SOCIOLOGY
University Institute of Lisbon

Ed. ISCTE, Av. das Forças Armadas, 1649-025 Lisboa - Portugal
tel | phone: +351 213 484 018 | fax: +351 217 940 074
e-mail: cies@iscte.pt | site: http://cies.iscte.pt

FCT
Fundação para a Ciência e a Tecnologia
MINISTÉRIO DA EDUCAÇÃO E CIÊNCIA

Model of analysis

SOUTHERN EUROPEAN COUNTRIES Portugal, Spain, Italy, Greece			
Equity		Quality assessment and monitoring	
PARTICIPATION ACCESS	<ul style="list-style-type: none"> Tracking/selectivity Schooling dynamics/enrolments Schoolar pathways ans transitions process Diversification of the school population 	STUDENTS	<ul style="list-style-type: none"> Standartized exams External assessments
Success/ RESULTS	<ul style="list-style-type: none"> Attainments Educational programmes Early School Leaving; PISA; Adults education; Special education 	TEACHERS	<ul style="list-style-type: none"> Evaluation Monitoring Profissionalization
EXPENDITOR	<ul style="list-style-type: none"> Public/private financing Students expendor Aiding 	SCHOOLS / ORGANISATIONS	<ul style="list-style-type: none"> Public management
<p>Explanatory Variables: Severity of the economic /financial crisis (2008- ...) & Political cycles Research hypothesis: The education system as a process, in its ambivalence: Democratization Vs Selectivity</p>			

Main objectives

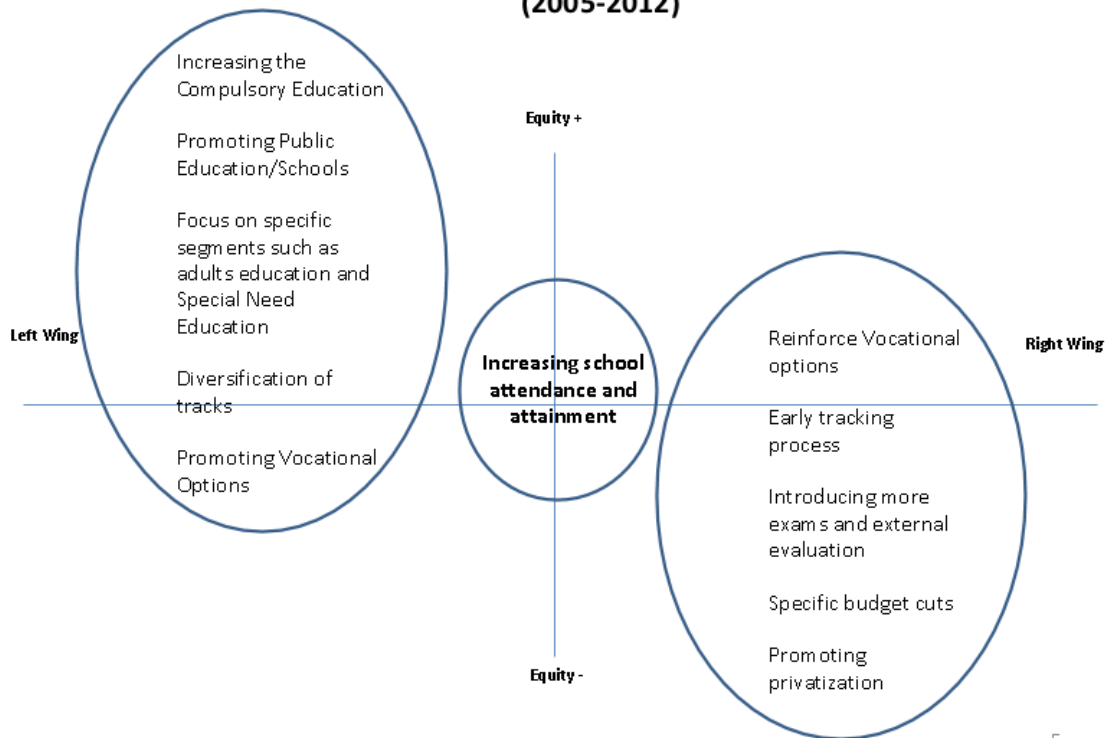
- To identify the differences and regularities among the Southern countries under study: Portugal, Spain, Italy and Greece
- To analyse and compare the crisis effects of the recent economic crisis in the education system of the 4 southern countries
- Methodology: Politics analysis, legislation and indicators; Interviews to experts in the education field

The Southern Europe Educational Tendencies in the last decade

- Increasing the levels of population schooling and school attainments
- Progressive decreased of Early School Leaving rates
- Increasing the Vocational – tracks and numbers of students
- Better results in international exams such as PISA
- Still, lower qualifications within the European context and evident levels of school failure and school -drop-out
- After the Crisis, several evidences starting to show signs of recession on educational outcomes: cuts on expenditure; cuts on school aiding; less teachers; less students; cuts on specific educational programmes

Although the visible approach to European standards, this process occurred differently in Southern countries showing there is no evidence to assume the existence of a Southern model. Different priorities, different results.

Ideological-political configuration of political measures in equity ambit (2005-2012)



5

	2000	2005	2010	2012/2013
Portugal	Left Wing Vocational – 7% Adults – 3,4 % Pré-Primary – 80,7%	Left Wing Vocational – 31% Adults – 4,1% Pré-Primary – 86,3% Developing Inclusive Agenda Bellow ISCED 3 – 73,5%	Left Wing Vocational – 38,8% Adults – 5,8% % Pré-Primary – 94,1% +Adults education policies	Right Wing Vocational – 43,6% / Early tracking(age 13) Adults – 9,9% (10,6% at 2012) Pré-Primary – 97,9% Bellow ISCED 3 – 62,4 Ending “AE” options Decreasing on Special Education
Spain	Right Wing Vocational – 33,5% Adults – 4,5 % Pré-Primary – 100%	Left Wing Vocational – 42,6% Adults – 10,5% Pré-Primary – 99,5% Bellow ISCED 3 – 47,4%	Left Wing Vocational – 44,6% Adults – 10,8% % Pré-Primary – 98%	Right Wing Vocational – 45,5% Adults – 10,8 % Pré-Primary – 97,6% Bellow ISCED 3 – 45,6% Early tracking (age 15) Expansion of exams
Italy	Right Wing Vocational – 24,6% Adults – 4,8 % Pré-Primary – 100%	Right Wing /Coalition Vocational – 61,5% Adults – 5,8 % Pré-Primary – 94,3% Bellow ISCED 3 – 49,6%	Right Wing Vocational – 60% Adults – 6,2% Pré-Primary – 91,5%	Right Wing Adults – 6,4 % Pré-Primary – 90% Bellow ISCED 3 – 42,8% Developing Inclusive Agenda
Greece	Left Wing Vocational – 32,1% Adults – 1,1 % Pré-Primary – 81,7%	Right Wing Vocational – 36% Adults – 1,9 % Pré-Primary – 75,5% Bellow ISCED 3 – 40%	Left wing Vocational – 30,7% Adults – 3,3 % Pré-Primary – 94,7%	Right Wing Vocational – 31,7% Adults – 2,9 % Pré-Primary – 95,6% Bellow ISCED 3 -34,3% Several cuts

Diachronic analysis (2000-2012/2013)

7

Conclusive notes

Tendencies:

- **Convergence toward European patterns: within profound context of globalisation and international “influence” (Lisbon Strategy – boost on educational policies) generic results: less “Early School leaving” in every country; increasing schooling attainments; increasing the educational offers.**
- Interruption of the convergence, with most evidence in countries such as Portugal – with a clear interruption on policies and educational measures - meaning compromising equity levels.

Crisis or “ideology” as explanatory variables on political choices?

A combination of both:

- Specific changes at educational political domain were observed in all four countries – a tendency to “selectivity” linked with right wing parties and policy choices – Portugal, Spain; a tendency to increase in “democratization” – Italy; a severe adaption to the crisis context - Greece.
- Cuts observed in specific educational sectors – adults, Special Need Education (more evident in Portugal) showing that ideology were stronger in some countries.
- General cuts on budgetary systems as a way to adapt to crisis impacts.

g) Articles in progress for future submission

Crisis and Education in Southern Europe: the Effects of Austerity and Ideology

1. Introduction

A crise financeira em 2007 nos EUA evoluiu rapidamente para uma crise sistémica mundial com impactos profundos nas mais diversas regiões do mundo e nos diversos setores económicos e sociais. Para a Europa, enredada num processo complexo de integração política, monetária e económica, o impacto da crise financeira evidenciou um conjunto de fragilidades estruturais e tensões latentes, nomeadamente quando se tornou clara a necessidade de uma resposta única e eficaz num quadro de globalização dos mercados financeiros. A ausência dessa resposta comum veio pôr em evidências as ambiguidades, conflitos, ressentimentos, egoísmos e preconceitos prevaletentes entre países e grandes famílias políticas europeias.

A orientação neoliberal e conservadora da maioria dos governos nacionais e, logo, das instituições europeias, fez com que estas adotassem uma lógica rígida de austeridade visando o objetivo exclusivo de sustentar o sistema financeiro. Passou-se assim de uma crise financeira para uma crise mais ampla que não resolveu o problema da sustentabilidade financeira, enquanto causou, em particular nos países mais afetados pela crise, um forte impacto negativo nas políticas sociais e, de modo geral, no que se costuma designar por modelo social europeu.

The aim of this paper is showing that the evolution of education indicators in southern European countries were improving and recovering for the last decades. This process was not at all uniform, neither considering the rhythm nor the factors, nor even the policy and institutional choices of each of the four countries (Portugal, Spain, Italy and Greece). The empirical evidence also shows that the EU was – in more than one way – a relevant actor in this matter, uncovering the Europeanization process that helps to explain how European orientations impacted differently the four countries (Radaelli, 2003). But it was effective until the crisis, and the European and national policies to deal with it, put an end (or at least a long break) to the process. The main question to be answered, comparing the four countries' education systems evolution, is about the trade-off between the financial constraints imposed by the austerity programs and the ideological orientations of national governments affecting the policy reforms. Did the financial crises play an important role in educational policy making, or was this mainly the result of political choices, eventually justified by the context of the crises?

2. Agendas Educativas Nacionais e Processo de Europeização

Throughout the 1990s, a positive period for European integration, there is an evident strive for the deepening of the Union in economic and also social and political matters, strongly driven by the European Commissioner Jacques Delors. The Lisbon Summit in 2000 was the *zenith* of this trend.

In the context of a global knowledge economy and information society, one relevant dimension of the political agenda, both at the European and the UE Member States level, was the objective of school expansion and rise of qualifications. On one hand, this was supposed to increase some

kind of sense of “European citizenship” that is still missing. On the other hand, it was a priority to address the problem of the skills demand, the growth of high complex jobs demanding increasing capabilities, mainly in those countries where there were persistent traces of social selectivity and poor educational quality - e.g., low level of qualifications’ structure, low levels of adults’ engagement in lifelong learning activities, high rates of early school leaving, bad results in international measuring of youngsters competencies and wide school failure - as it was the case in southern Europe. This group of countries accepted the “qualifications challenge” and the results were, as we will see, encouraging.

By 2005 the impetus for a social Europe and for the convergence of social and educational standards had cooled down. The slowdown of economic growth and the rise of liberal parties across Europe lead to a focus displacement of the social (employment and social inclusion) concerns towards economic and monetary policies. In the mid-term review of the Lisbon strategy the triangular dynamic in which it was based had become bipolar – linking employment to economic growth - and social policies left the core agenda. But southern Europe was still making its path, mainly with Portugal joining the peer countries. The 2007/2008 crisis has put an end to the process. At the beginning, European Institutions decided to launch the “automatic stabilizers” and education benefited from this. But since 2010 the debts crisis promoted the budget orientation consensus to “launch automatic hard austerity programs that had particularly hardship consequences in southern Europe and Ireland. This had huge impacts in the trajectories of the southern European countries in education achievements, and reinforced the debate about the relevance of education policies in Europe.

A forma como cada país do sul reagiu à crise e como decidiu afetar a educação com as restrições da austeridade variou muito. Como provavelmente seria de esperar, dado que ao longo das últimas décadas se foram construindo sistemas de educação bastante diferenciados. Não encontramos, de facto, nesta matéria, qualquer sustentação para a defesa da existência de um Estado Social típico da Europa do sul (Ferrera, ...), como outros autores defendem ao analisar outras matérias, no âmbito de uma controvérsia que se alargou à modelização dos sistemas educativos e seus resultados, como por exemplo encontramos em Andy Green (2009, 1999). Na realidade, as semelhanças situam-se apenas ao nível da imagem de uma região com populações menos qualificadas, o que só é verdade nalguns casos, e menos interessadas em qualificar-se, o que tem vindo a revelar-se igualmente um estereótipo sem base empírica.

Os défices de qualificação da população dos países do sul da Europa são atributos estruturais que se associam a processos históricos que incluem a industrialização tardia (embora com muitas variações regionais), a baixos níveis de produtividade e competitividade económica e à especialização assente em empregos intensivos em trabalho, a elevados níveis de desigualdades sociais, à tardia concretização de sistemas universais de proteção social e ao retardamento da construção de sistemas educativos com vocação universalista, em parte devido ao prolongamento até meados dos anos 70 de ditaduras conservadoras, assentes em estados autoritários, mas com subdesenvolvimento de funções. A plena integração europeia destes países (com exceção de Itália, país fundador), na sequência de processos de rutura com as ditaduras, constituiu uma manifestação de vontade declarada da sua parte na aproximação à ordem institucional e política, bem como aos níveis e padrões médios de vida europeus, facto que implicou a reorientação de muitas das suas afinidades históricas.

Essa vontade de “europeização” (Featherstone & Radaelli, ...ref^a.) é exemplar no que toca ao foco posto na ação dos governos nacionais no sentido da convergência, independentemente da ação das instituições europeias, que em matéria de educação não passaram da produção de algumas orientações programáticas, pequenos orçamentos para financiar certos segmentos dos sistemas (como a educação vocacional) e pela aprovação da Declaração de Bolonha em 1999 e da Estratégia de Lisboa em 2000 (Featherstone e Kazamias, 2009) ([vem aqui porque dizem o quê?](#))..

Este facto contribui, sem dúvida, para a manutenção de uma elevada diversidade de arranjos e particularismos nos sistemas educativos, assim como de significativas diferenças nos seus desempenhos, já que se encontram fortemente condicionados pelo que tem vindo a chamar-se “path dependency” (Ref^a). Esta diversidade e disparidade entre sistemas educativos europeus é particularmente relevante quando comparamos os níveis educativos dos países do norte e centro da Europa e os do sul.

Não se procurando discutir todos os vetores de modernização que a europeização e os esforços de convergência desencadearam na Europa do Sul, sabemos que os efeitos encetados por este processo conduziram a importantes estímulos no domínio das orientações políticas, nos quadros institucionais e no posicionamento dos atores face aos sistemas educativos. Moreno-Fuentes e ... (2013) referem que o fenómeno de europeização, enquanto mecanismo de referenciação nas sociedades periféricas em processo de modernização, desencadeou de forma quase natural processos de convergência e trajetórias distintas, até porque alguns dados estruturais de origem eram já por si distintos. Elementos relevantes deste processo foram ainda constituídos pela atuação de agências internacionais que desencadearam programas de promoção da escolaridade (UNICEF) ou desencadearam processos de avaliação comparativa do desempenho dos sistemas educativos e do seu impacto na competitividade económica (nomeadamente a OCDE e o Banco Mundial) (Valter Lemos, ...). Outro tipo de iniciativas, como o desenvolvimento de sistemas estatísticos europeus especificamente dedicados à educação escolar (Eurydice) vieram igualmente colocar em evidência a necessidade de investimentos sustentados para a redução do atraso educativo e a convergência com a média europeia. Essa evidência estava muito assente nas teorias do capital humano (Ref^a) num contexto de crescente complexificação da competitividade das economias nacionais no quadro da economia global baseada no conhecimento (Drucker, 1993; Castells, 2000, Costa, A.F.2003³⁵);).

Foi portanto num quadro complexo que os países do Sul da Europa conseguiram de modo efetivo modernizar e desenvolver as suas sociedades e os principais sistemas políticos típicos da Europa mais desenvolvidas, apesar de iniciaram o processo de convergência sob condições de partida claramente mais desfavoráveis, já que tinham terminado os “trinta gloriosos” depois do fim da guerra e as condições excecionais de crescimento e justiça social que a Europa conheceu no período) (Ref^a), (Capucha 2014). Mas conseguiram-no em boa parte, ou estavam prestes a consegui-lo, pelo menos no domínio da educação e das qualificações, quando o trajeto foi abruptamente interrompido pela crise.

³⁵ Drucker, Peter (1993) *Post-Capitalist Society*, New York, Harper Collins Publishers.

Costa, António Firmino da Costa (2003), “Competências para a sociedade educativa: questões teóricas e resultados de investigação”, em AAVV, *Cruzamento de Saberes, Aprendizagens Sustentáveis*, Lisboa, FCG

3 – Dinâmicas de convergência da Europa do Sul na escolarização e nos resultados educativos

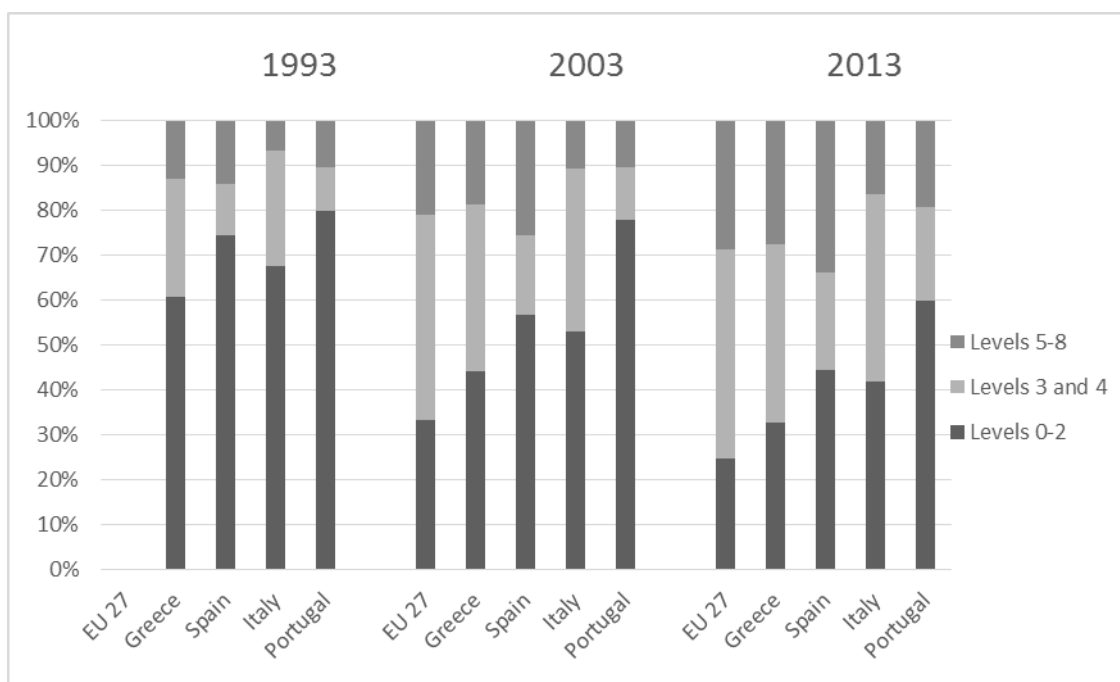
A análise da tendência de convergência verificada nos resultados dos países da Europa do Sul na área da educação e qualificação, assume dois vetores analíticos:

(1) Em primeiro lugar, estes países, face aos países da Europa Central e do Norte, apresentam fragilidades estruturais persistentes nos seus desempenhos. Isto pode ser verificado, por exemplo, na maior dificuldade de concretização da escolaridade obrigatória (Martins, Susana, 2012), ou na parcela mais significativa da população ativa que apresenta níveis de qualificação escolar mais baixos (como se virá mais à frente). (2) Em segundo lugar, a entrada na Comunidade Europeia influenciou processos de modernização das estruturas sociais, económicas e educativas com objetivos claros de convergir face aos padrões médios dos pares aos objetivos de referência para estas áreas.

A afirmação de que se verificou um processo de convergência dos quatro países do sul da Europa no que respeita aos resultados em educação e à melhoria da performance dos sistemas educativos é sustentada pela análise dos quatro indicadores relativos às qualificações presentes na Estratégia 2020: taxa de abandono escolar precoce; taxa de diplomados no terciário; taxa de adultos envolvidos em ações de educação e formação; e taxa de alunos envolvidos na educação vocacional.

Uma simples análise da estrutura de qualificações da população ativa (dos 25 aos 64 anos) nos quatro países da Europa do Sul em consideração neste paper, faz ressaltar um défice estrutural comum, com o predomínio das qualificações escolares mais baixas.

Gráfico 1: Distribuição da população ativa (25-64 anos) por nível de ensino, em 1993, 2003 e 2013.³⁶



Fonte: Eurostat.

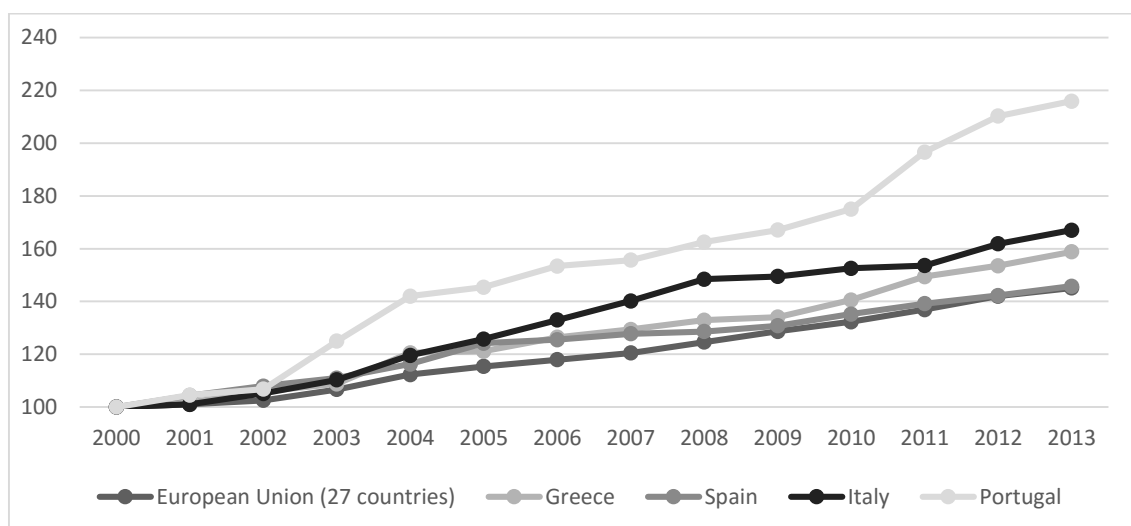
Em 1993 as qualificações equivalentes ao ensino primário eram bastante significativas, destacando-se Portugal pela percentagem mais elevada (80%), seguido imediatamente pela Espanha (74,8%). A Grécia e a Itália, que também apresentavam percentagens elevadas (60,9% e 67,5% respetivamente), demonstravam simultaneamente resultados mais animadores relativamente à população com o equivalente ao ensino secundário (26,1% e 25,7% respetivamente). Feita exceção à Itália, poucos anos tinham passado desde a adesão à CEE e ainda se revelavam com nitidez as consequências do atraso histórico no desenvolvimento educativo nestes países, em processo de consolidação da democracia e de construção do complexo institucional do sistema de educação, traduzido na prioridade atribuída a reformas que pudessem fomentar o acesso e a participação em massa nos níveis mais baixos do sistema, num momento em que no norte e centro da Europa as prioridades educativas já se tinham reorientado para a massificação dos níveis mais elevados de escolaridade.

Os esforços efetuados pelos países do Sul permitiram que em 2003 parte importante do atraso de partida tivesse sido recuperado, podendo ser identificado um crescimento acelerado da percentagem da população com o ensino secundário e um recuo da população apenas com o ensino primário. Verifica-se, também, que estes esforços nacionais se desenvolveram a ritmos diferentes, como se pode ver com os resultados menos favoráveis e o ritmo mais “lento” de Portugal. Começam nessa altura igualmente a delinear-se tendências que se orientam claramente para o padrão médio europeu (crescimento do secundário e do ensino superior): os casos da Grécia e da Itália, com preponderância da população com o ensino secundário (37,33% e 36,13% respetivamente) são os que mais se aproximam da média europeia (44,7%), enquanto a Espanha, ao nível dos resultados de conclusão do ensino superior, registava valores que ultrapassavam os da média europeia (20,4% de média Europeia, e 25,4% em Espanha), juntando-se-lhe a Grécia com um aumento de mais de 10 pontos percentuais neste nível de ensino (18,5%).

Em 2013 verifica-se que subsiste a maior fragilidade de Itália e Portugal na concretização das taxas de ensino superior mas, ainda assim, é notório o esforço de recuperação (16,2% e 19,3% respetivamente sendo a média da EU de 28,4%). Por outro lado, registam-se melhores resultados ao nível da escolaridade secundária em Itália e Grécia (41,9% e 39,8%) mantendo-se a Espanha a liderar no ensino superior, apresentando a percentagem mais elevada de população com este nível de ensino (33,7%). Por sua vez, Portugal regista uma maior recuperação entre 2003 e 2013 em todos os níveis de ensino (queda nos níveis inferiores ao secundário e crescimento deste e do superior), embora se mantenha como o país da Europa do Sul que apresenta o pior desempenho educativo.

Segundo as metas da Agenda 2020, espera-se que a percentagem de diplomados com o ensino superior entre as pessoas com idades entre 30 e 34 anos seja de 40% naquele ano. Portugal, com apenas 27,2% em 2012, está ainda distante, mas 44% em Espanha (40,1% em 2012); 26-27% em Itália (21,7% em 2012); e 32% na Grécia (35,8% em 2012). A convergência nesta área, como se pode verificar no Gráfico 2, é clara, sendo mais acelerada nos países, como Portugal, que partiram de uma situação mais recuada.

Gráfico 2: Taxa de diplomados com Ensino Superior³⁷ (idades 25-64 anos) : Index =2000



Fonte: Dados Eurostat. **Cálculos efetuados pela equipa.**

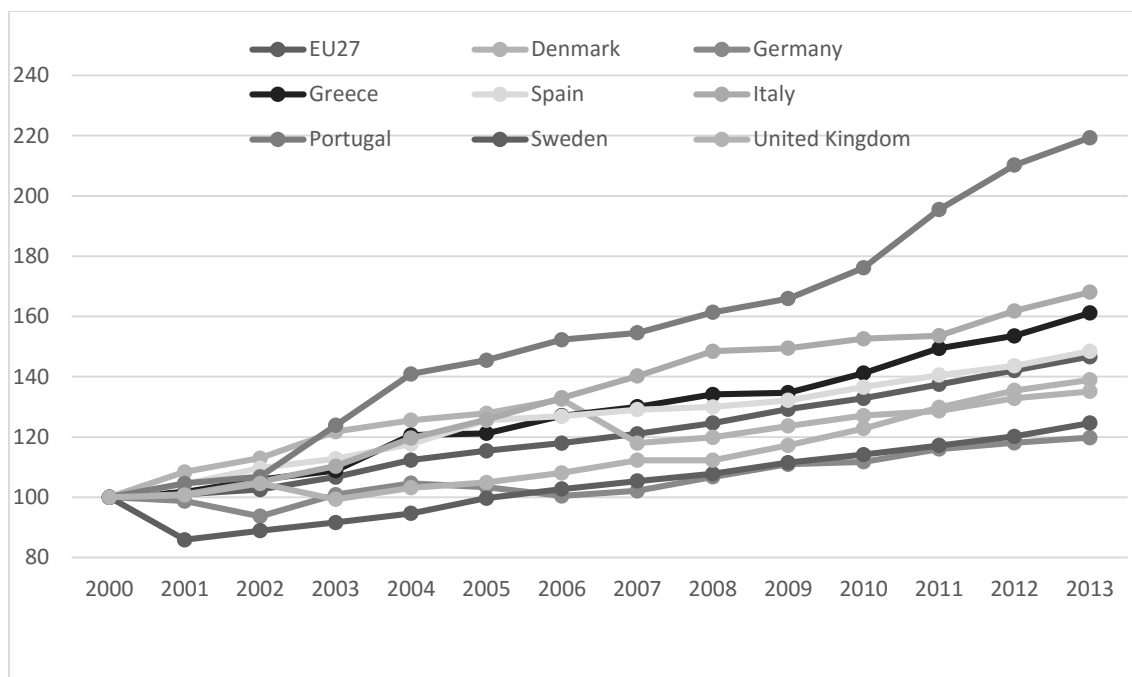
Portugal, que apresentava uma posição mais fragilizada neste indicador, é o país onde o esforço para a recuperação tem sido proporcionalmente mais efetivo. Note-se que aumentou a taxa de diplomados (25 aos 64 anos) de 8,8% em 2000 para 19,3% em 2013. Verifica-se que, particularmente a partir de 2006-2007, os países do Sul não deixaram de evidenciar uma trajetória ascendente mesmo quando o contexto de crise começava a dar indícios de se agravar. Na generalidade, há duas ideias a reter: (1) os países que detêm piores resultados nas taxas de ensino superior, Portugal e Itália, são aqueles com esforço mais evidente; (2) a tendência comum

³⁷ Apenas inclui o equivalente ao ISCED 5 e 6, contrariamente ao anterior gráfico onde são incluídos os níveis 7 e 8.

é de crescimento acima do verificado na média da EU, que porém também evidencia uma trajetória de crescimento.

Aliás, em matéria de resultados, a evolução dos países da Europa do Sul é equivalente ou até mesmo mais positiva do que a observada em países da Europa do norte e central, como observado no gráfico 3.

Gráfico 3: Diplomados do Ensino Superior, Index 100=2000



Fonte: Eurostat.

Qualquer dos países da Europa do Sul apresenta ritmos de progressão semelhantes ou superiores aos da Suécia, Dinamarca, Alemanha e Reino Unido, ao longo destes últimos 13 anos. Portugal subiu a sua taxa de diplomados em 10,5 p.p.

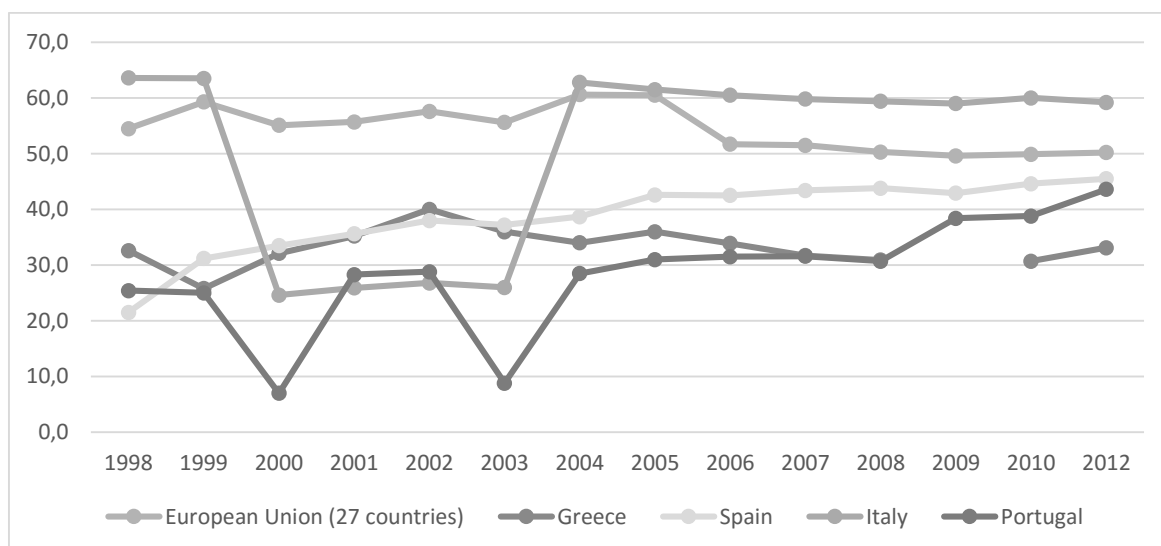
Também as políticas de Educação Vocacional e de Aprendizagem ao Longo da Vida têm tido uma posição central na agenda Europeia e de outros organismos internacionais de referência (OCDE, por exemplo) e, por extensão, também nas agendas educativas nacionais. Essas políticas têm sido sistematicamente referidas como instrumentos estratégicos para a qualidade da sociedade, para a cidadania e a integração social e para responder às necessidades de mercados de trabalho cada vez mais competitivos, no contexto da economia do conhecimento e da sociedade da informação.

Como aconteceu com o crescimento da escolaridade e das qualificações de nível terciário, nestes dois domínios verifica-se de uma maneira geral que os países do sul apresentam uma

tendência convergente com o padrão europeu e diferenças relevantes entre si, quer nos resultados, quer na periodização dos ritmos dessa convergência.

No que respeita ao primeiro indicador, Educação Vocacional (gráfico 4), observamos primeiramente que existe uma tendência para o aumento de alunos que ingressam nestas vias, todavia mais evidente em alguns dos casos. Espanha e Portugal aumentaram em 24 p.p. e 18,2 p.p., respetivamente o número de alunos que optam por este segmento de ensino (Espanha, 45,5% e Portugal, 43,8% em 2012), apresentando a Itália, por seu turno, uma descida de 4,4 p.p., de resto em linha com o verificado na média da EU (uma descida de 4,3 p.p.). Note-se, no entanto, que a Itália parte em 2000 com uma percentagem acima daquela observada nessa média (Itália: 63,6% e EU 27: 54,5%, em 2000), por ter investido mais precocemente nesse segmento da educação. Já no caso da Grécia verifica-se a situação oposta, sendo um sector com pior evolução no qual se regista um ligeiro aumento e um valor claramente abaixo dos 50,2% da média europeia em 2012 (33,1%).

Gráfico 4: Alunos que integram as áreas profissionalizantes dentro do total dos alunos no ensino secundário (equivalente ISCED 3, expresso em %)

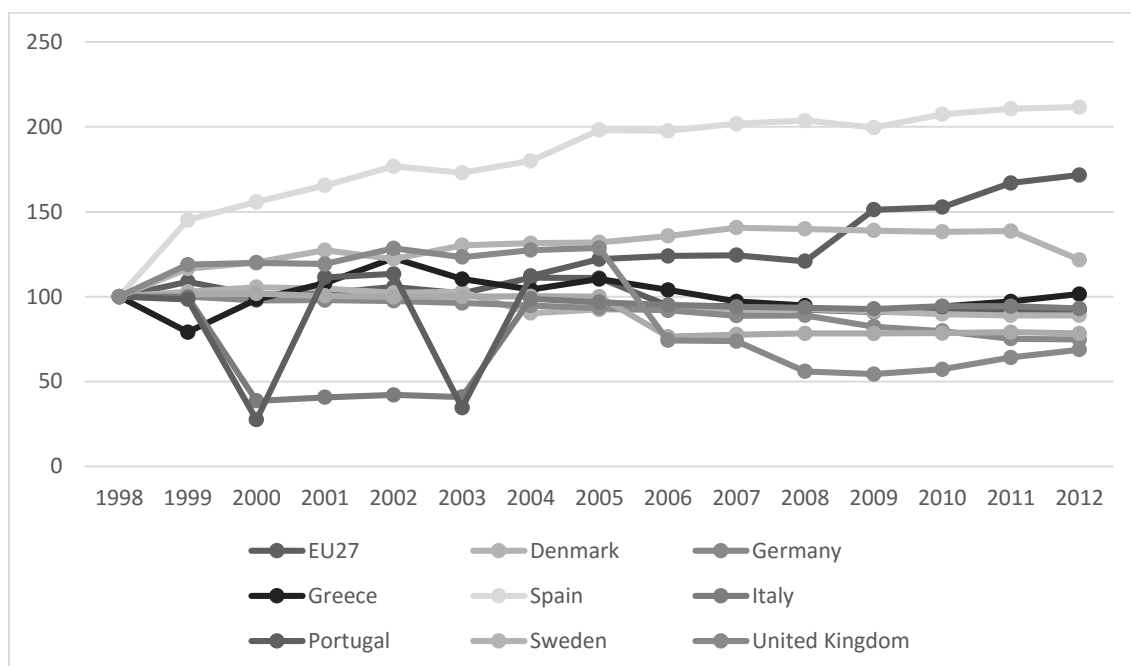


Fonte: Eurostat.

Nota: quebra de série em 2000 e 2003 para Portugal e Itália.

Apesar destas diferenças apontarem para a existência de prioridades distintas de política educativa em diferentes ciclos temporais, assim como ritmos diferentes nas tendências evolutivas dentro dos países da Europa do sul, quando incluímos na análise comparativa outros estados-membros da UE, a evolução da percentagem de alunos que integram as áreas profissionalizantes dentro do total dos alunos no ensino secundário (ver gráfico 4) tendo como base 1998, mais uma vez confirmamos que a evolução geral dos quatro países do sul tem sido em tudo semelhante ao verificado em outros países da Europa continental e nórdica.

Gráfico 4: Alunos que integram as áreas profissionalizantes dentro do total dos alunos no ensino secundário (equivalente ISCED 3, expresso em %) Base 100 = 1998



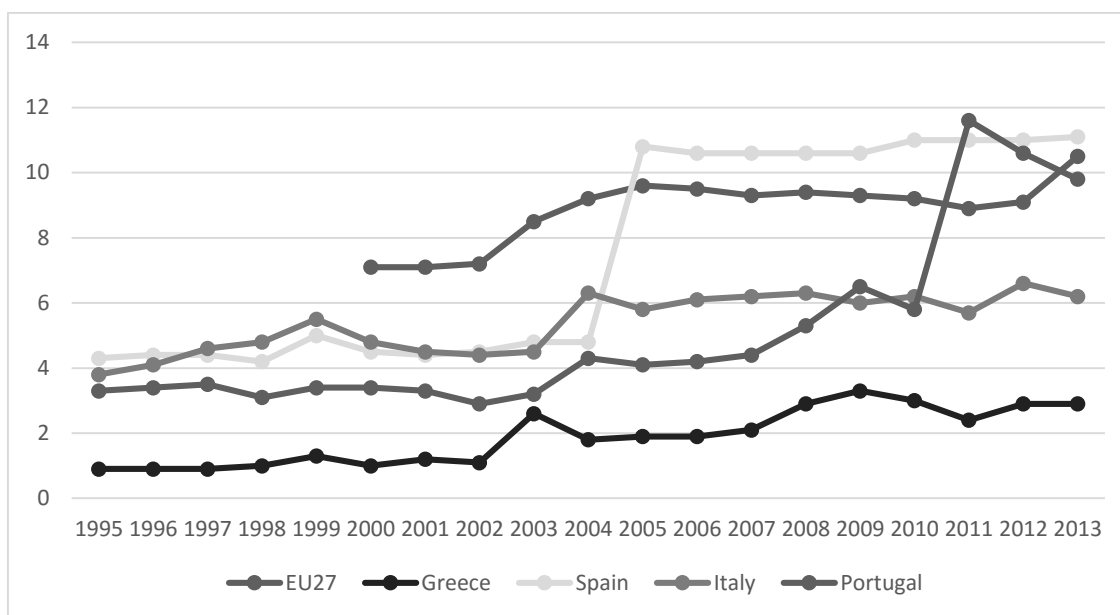
Fonte: Eurostat

Nota: quebra de série em 2000 e 2003 para Portugal e Itália.

Os valores absolutos são, aliás, demonstrativos justamente de uma aproximação muito clara dos países do sul, ao passo que, embora as instituições Europeias insistam nesta área de política como uma prioridade, se regista uma quebra de alunos na educação vocacional em alguns dos outros países. Na Alemanha o indicador cai 16,3 p.p. (apresentando uma taxa de 48,3% em 2012); na Dinamarca desce 7,1 p.p. (apresentando uma taxa de 46,1% em 2012); na Suécia não decresce mas mantém-se uma taxa idêntica à que se apresentava em 2000 (49,4% em 2012) e na Inglaterra regista-se o caso de maior quebra, de 28 p.p., apresentando uma taxa (38,6% em 2012) inferior às de Espanha, Portugal (sublinhe-se a subida muito rápida deste país apenas depois de 2008) e Itália.

No que respeita à **Aprendizagem ao Longo da Vida**, verifica-se uma evolução de convergência a um ritmo mais lento, porém mais visível em alguns países. Tendo sido igualmente uma área privilegiada na Agenda de Lisboa e nas atuais prioridades da Europa, os esforços para um aumento do número de adultos envolvidos em ações de formação é particularmente visível nos casos de Espanha e Portugal, sendo os casos da Itália e da Grécia países em que se regista uma menor evolução. O gráfico 5 apresentada valores de 1995 até 2013, mostrando que o maior salto aconteceu depois de 2000.

Gráfico 5: Participation rate in education and training (last 4 weeks) % total population aged 25-64

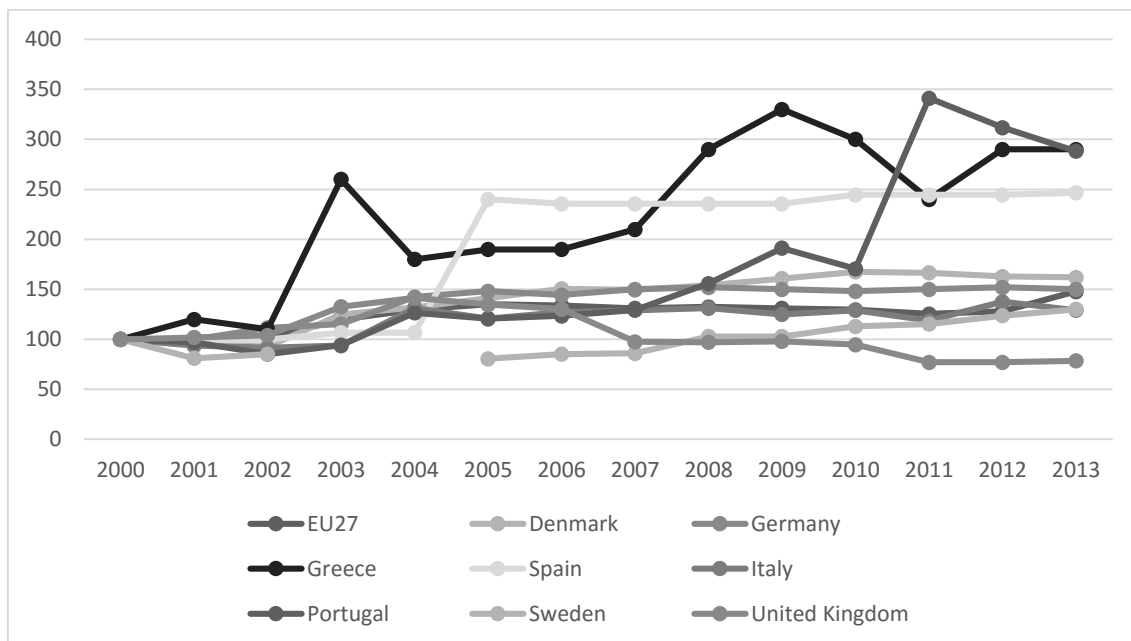


Fonte: Eurostat, Labor Force Survey

Espanha (11,1%) apresenta atualmente uma taxa de participação acima dos 10,5% da média da EU. No caso de Portugal, o programa Novas Oportunidades, surgido em 2006 com o objetivo de qualificar e facilitar o acesso da população adulta à educação, bem como aumentar os níveis de escolaridade, produziu um impacto extremamente positivo, verificando-se um aumento desta taxa em 6,4 p.p. (9,8% em 2013). Note-se que a partir de 2011 este indicador começa a decair fruto das opções de política nacionais que conduziram ao termo do programa Novas Oportunidades sem que tenha existido a sua substituição por qualquer outra medida de idêntica dimensão no campo da educação e formação de adultos. Itália e Grécia cresceram apenas ligeiramente 1,4 p.p. e 1,9 p.p. respetivamente, apresentando taxas de participação mais baixas e com uma evolução francamente mais lenta, da qual destacamos a Grécia que apresenta uma das mais baixas taxas da Europa a 27 (2,9%). Sublinhe-se que ambos os países registam declínios nos primeiros anos após a crise, retomando os valores anteriores após 2011.

Quando colocamos em evidência a comparação com os outros quatro países europeus até aqui utilizados para complemento da análise, verificamos que são os países do norte que se destacam pelas taxas de participação mais elevadas (Suécia 28,1% e Dinamarca 31,5%, em 2013) claramente acima da média da EU (10,5%), juntamente com o Reino Unido, cuja taxa é de 20,5% (ainda que tenha descido 4,4 p.p. no intervalo de tempo considerado). A Alemanha surge neste panorama com valores mais próximos e mesmo abaixo daqueles que encontramos na Europa do Sul (registando 7,8% em 2013).

Gráfico 6: Participation rate in education and training (last 4 weeks), % total population aged 25-64, Index=2000

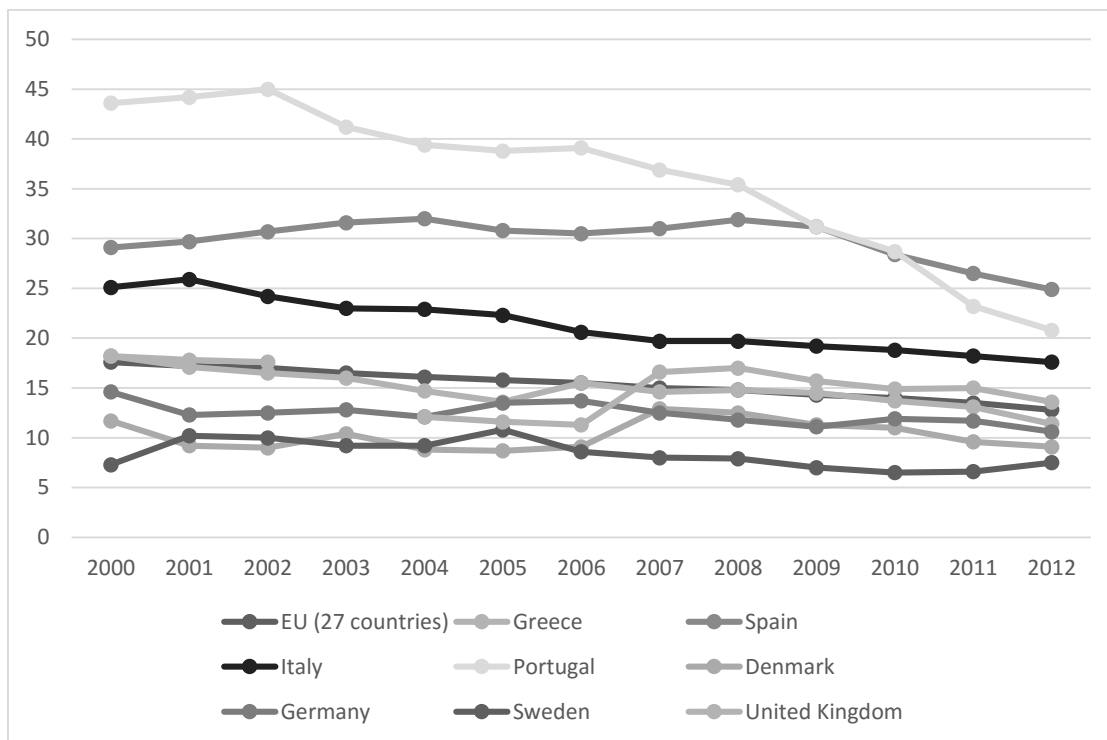


Source: Eurostat, Labor Force Survey

Não obstante, olhando para o gráfico 6, percebemos que o esforço da Europa do sul neste indicador não produziu resultados distantes dos verificados nos seus pares do norte. Também neste caso os países que apresentam taxas em valores absolutos mais baixas, colocando-os em situação de desvantagem, são aqueles onde os esforços de progressão foram mais significativos. Mais grave parece ser as situações dos que parecem estagnar.

A taxa de “Abandono Escolar Precoce” (gráfico 7) calculada através dos dados recolhidos pelo “Labor Force Survey”, é respeitante à parcela da população com idades compreendidas entre os 18 e os 24 anos que não completou pelo menos o ensino secundário e não se encontra a estudar nem em formação. É um instrumento chave que permite a monitorização dos sistemas de educação e formação no que diz respeito à sua qualidade e ao nível do sucesso fomentado.

Gráfico 7: Taxa de Abandono Escolar Precoce

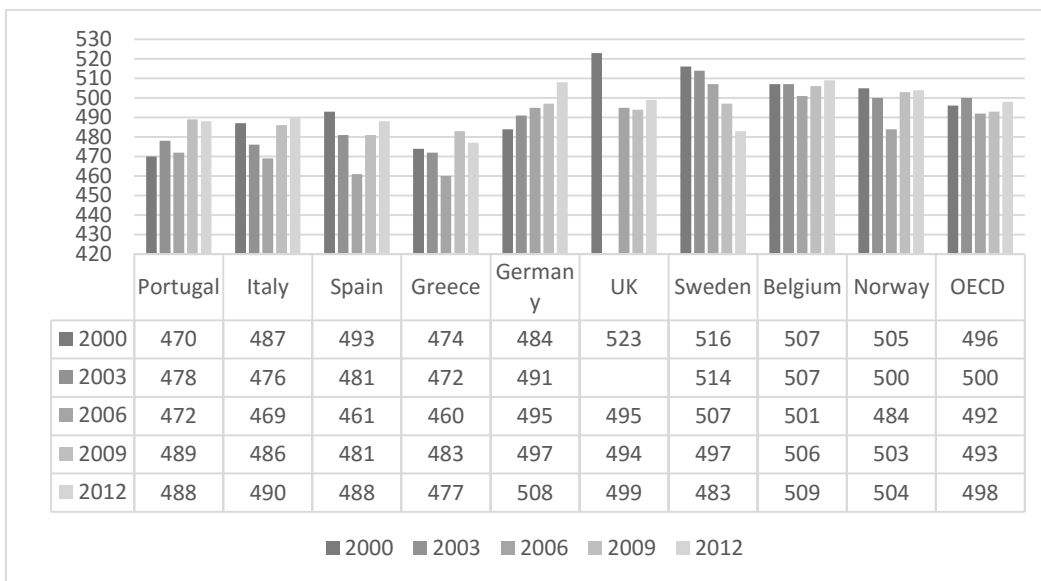


Fonte: Eurostat, Labor Force Survey

Recentemente, relatórios da OCDE (ETG, 2013) referem que os países do sul europeu têm tido uma progressão bastante significativa neste indicador, que tem vindo a melhorar em toda a Europa, quedando no entanto ainda aquém das metas previstas para 2020 (10% de Abandono Escolar Precoce). Analisando a informação do gráfico 7, verifica-se de facto que existe uma tendência geral de decréscimo, mais acentuada em Espanha e principalmente em Portugal, países que mantêm apesar disso as taxas mais elevadas da EU (24,9% e 20,8 %, respetivamente), ainda distantes da média Europeia ou dos resultados evidenciados pelos países do norte Europeu. A Itália apresenta um valor de 17,6%, um pouco mais próxima da taxa da média da UE (12,8%) e a Grécia apresenta a situação mais favorável, com uma taxa de 11,4%, integrando-se no grupo formado por todos os restantes países aqui representados, dos quais apenas a Dinamarca (9,1%) e a Suécia (o único país que piorou em relação a 2000, de 7,3% para 7,5%) estão abaixo do objetivo europeu para 2020. A recuperação verificada em termos da convergência de Portugal, Espanha, Itália e Grécia no que respeita abandono escolar precoce é pois inequívoca.

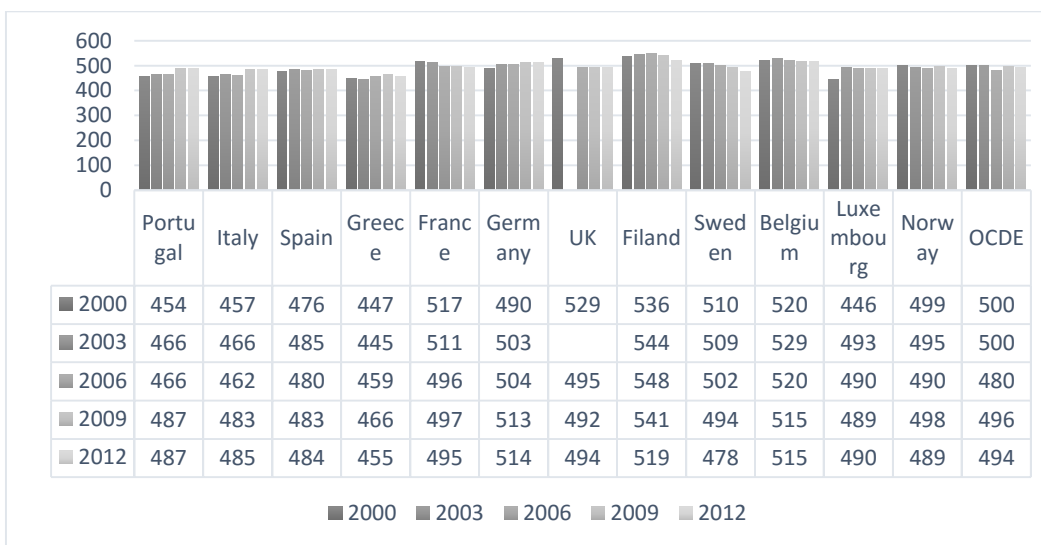
Uma vez mais encontramos uma evolução positiva numa matéria que tende a permitir leituras da qualidade das aprendizagens, os testes do PISA (Gráficos 8 e 9), um teste realizado pela OCDE às competências de jovens com 15 anos em língua materna e matemática.

Gráfico 8: Resultados PISA, Proficiência na Língua



Fonte: PISA database.

Gráfico 9: Resultados PISA na área da Proficiência na Matemática



Fonte: PISA database

Em ambas as áreas de competências é notória a evolução positiva registada nos países da Europa do sul, que após algumas oscilações, estabilizam em resultados indicativos de percursos de melhoria, embora com mais inconsistência global por parte da Grécia.

O gráfico 8, respeitante às competências no uso da língua materna, mostra que os países da Europa do sul sobem gradualmente após um período de oscilação, aproximando-se tendencialmente do score de 498 da média da OCDE. Pelo contrário, alguns outros países que tradicionalmente eram conhecidos pelas melhores performances dos sistemas educativos viram os resultados PISA a decrescer, como se verifica com a Suécia (os resultados colocam atualmente este país abaixo de Portugal, Itália e Espanha), facto a que provavelmente não serão estranhas

as transformações educativas radicais implementadas neste país a partir do início da década de 1990.

Na área da Matemática, verificamos que os resultados apresentam globalmente maior homogeneidade nos quatro países, acompanhando a Europa do Sul os restantes membros da OCED, particularmente com os casos de Portugal e Itália a demonstrarem progressos significativos (Portugal sobe 33 pontos, apresentando um score de 487, e Itália sobe 28 pontos, apresentando um score de 485) e aproximando-se do score médio da OCED de 494. O que se conclui é que estes quatro países da Europa do Sul (apesar de alguma inconsistência da Grécia) quase se encontram em “contraciclo”, dado que não acompanham a tendência geral de decréscimo nestes resultados, a que apenas escapa a Alemanha.

Em síntese, podemos identificar percursos convergentes dos países da Europa do sul em relação aos seus parceiros europeus, traduzidos por um claro padrão de aproximação dos resultados educativos da média europeia comunitária e da OCDE. A convergência dos resultados aqui analisados advém essencialmente dos esforços políticos nacionais, em parte impulsionados pela influência europeia e pelo efeito político das comparações internacionais. **Face a este contexto de heterogeneidade mas de convergência comprovada, e ao atual contexto de crise e do consequente impacto das políticas de austeridade no sul da Europa, resta perceber até que ponto esse impacto repercutiu no sector de Educação.**

4 – Entre os constrangimentos financeiros e a ideologia educativa: o que fez mudar a educação na Europa do Sul em Contexto de Crise.

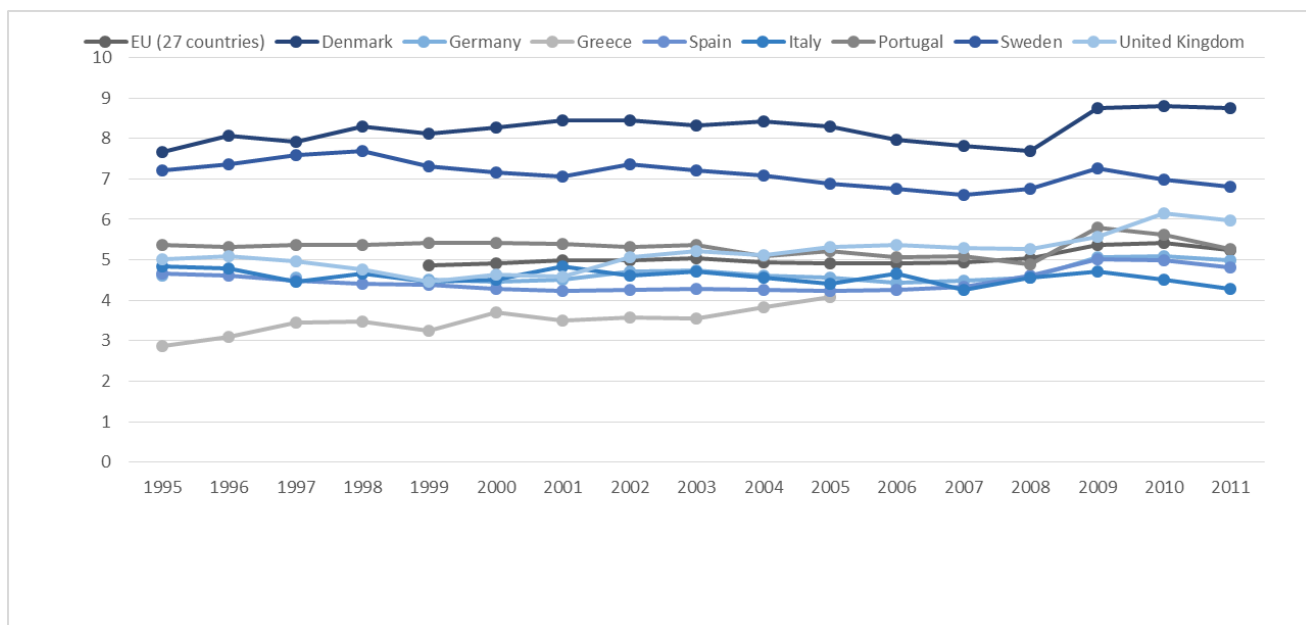
O processo de convergência que os países da Europa do sul vinham a concretizar, obtendo resultados visíveis de melhoria dos índices de qualificação das populações e no desempenho dos sistemas educativos, parece não ter sido interrompido a não ser no caso da aprendizagem ao longo da vida em Portugal.

Isto acontece apesar da existência de cortes orçamentais pronunciados resultantes da política de austeridade, esta tendência de desinvestimento concretiza-se em conformidade com as chamadas “políticas de ajustamento” estrutural, em particular do défice do Estado, que contrariam as proclamações públicas de promoção das qualificações e do investimento no capital humano. São ilustrativas desta duplicidade europeia as declarações da chanceler alemã Angela Merkel à agência financeira Bloomberg em Novembro de 2014, onde afirma que Portugal e Espanha têm demasiados licenciados, devendo assim recuar na obtenção deste grau académico como uma prioridade, apostando sim nas formações vocacionais de nível secundário (Público, 4/11/2014). Como se o sul devesse aceitar uma especialização económica de baixo perfil qualificacional – e consequentemente de menores rendimentos do trabalho – comparativamente com os seus parceiros da Europa do norte e do centro.

O impacto da austeridade fez-se sentir na evolução da despesa em educação em percentagem do PIB para um conjunto de países da União Europeia nos últimos 20 anos. Como pode ser observado no **gráfico 10**, a evolução da despesa tinha vindo a estabilizar-se na União Europeia desde 1995, com os países da Europa do sul a registarem um investimento inferior, mas a aproximarem-se de forma progressiva da média europeia e já registando níveis semelhantes a

países como a Alemanha ou o Reino Unido, embora a Dinamarca e a Suécia se tenham sempre mantido à distância, incluindo após a ligeira retração posterior a 2009. Com o advento da crise económica e financeira de 2007/8, assiste-se a uma tendência global de aumento do investimento que se verifica até 2010. Por sua vez, o ano de 2011 é marcado pela inversão desta tendência, registando-se a redução na despesa em todos os países considerados na amostra e na média europeia, sendo essa queda mais acentuada na Europa do sul.

Gráfico 10 - Despesa em Educação em percentagem do PIB, entre 1995-2011



Esta alteração tem a sua origem no Conselho Europeu de 17 de Junho de 2010, que marca a viragem para a austeridade nas políticas europeias de resposta à crise, estabelecendo-se a necessidade de “dar prioridade a estratégias de consolidação orçamental favoráveis ao crescimento e centradas principalmente na contenção de despesa” (Conselho Europeu, 2010: 2), através do reforço do papel do Pacto de Estabilidade e Crescimento na definição das metas, medidas e orçamentos nacionais. Note-se que este Conselho vem enquadrar as intervenções externas em Portugal e na Grécia por parte do FMI, BCE e Comissão Europeia, e também a implementação de pacotes de medidas de austeridade em Espanha e Itália, em função da pressão feita pela Comissão Europeia nesse sentido.

Porém, como pudemos verificar, os impactos nos resultados não estão visíveis. É possível argumentar como faz, que os efeitos das alterações nas políticas educativas só a prazo se fazem sentir plenamente. Por exemplo, como vimos, apenas nos últimos anos vimos a Suécia sofrer com a reforma dos anos 90, ao passo que a melhoria da Alemanha do PISA não se pode desligar do esforço de aumento da frequência das vias escolares de ensino que pretendeu equilibrar o excessivo pelo do sistema dual. É pois provável que o impacto das reduções orçamentais agora verificado só se reflitam plenamente nos indicadores de desempenho dos países do sul daqui a alguns anos. Essa constitui matéria que importa acompanhar. Mas também é possível argumentar, com mais consistência em relação aos dados já disponíveis, que o desempenho

positivo da Europa do Sul não é proporcional ao aumento da despesa, que estabilizou ou apenas cresceu ligeiramente. São, assim, as opções de política aquelas que parecem ter maior potencial de impacto

Há porém um país, Portugal, que constitui um caso particularmente interessante, na medida em que é o país que revelava atrasos estruturais mais acentuados e onde se tem verificado uma evolução recente mais pronunciada, decorrente de uma dinâmica intensa ao nível das políticas, mas também aquele em que um dos indicadores de desempenho, a ALV, piorou significativamente depois da crise.

O que se passou em Portugal de modo a que, num espaço de tempo tão curto, ao contrário dos restantes países em que a crise não parece ter afetado os principais indicadores de desempenho, tal se tenha verificado?

De facto, no caso Português, verificou-se uma viragem brutal de orientação nas políticas educativas. O contexto da crise funcionou mais como uma justificação, do que como uma causa da imposição de uma agenda ideológica que inverteu a trajetória que vinha a ser seguida.

Efetivamente, a leitura atenta do Memorando de Entendimento (MdE), assinado entre o estado português e a *troika* BCE-FMI-CE em Maio de 2011, dificilmente permite antecipar esta tendência. Pelo contrário, no único ponto especificamente dedicado à educação – o ponto 4.10 – é sublinhada a necessidade de o Governo prosseguir com os esforços de combate à baixa escolaridade e ao abandono escolar precoce, bem como de melhoria da qualidade do ensino secundário e do ensino e formação profissional. Estas prioridades assumem como objetivo “o aumento da eficiência no sector educativo, o aumento da qualidade do capital humano e a facilitação da adaptação ao mercado de trabalho” (MdE, 2011: 21).

Não terá sido portanto o MdE a provocar o início de um novo ciclo de restrição e de inversão nas políticas educativas que ele não previa. Por um lado, abriu-se um período de restrição, em que a preocupação com a gestão das medidas de austeridade impostas à educação se sobrepõe à preocupação com o desempenho do sistema de educação e formação. Por outro lado, tem lugar um crescendo de importância de medidas tributárias do paradigma conservador (devedor da lógica do “back to basics” americano dos anos 60 – ref^a) do *ensino por conteúdos*, típicas de um sistema seletivo – crescendo esse que não parece tanto estar ligado a estrangulamentos financeiros específicos como à concretização de uma agenda política de cariz conservador, o que vem representar a inversão das políticas que estiveram na base do processo de convergência.

A análise da evolução da despesa do Estado Português em Educação permite captar a tendência de restrição enunciada, bem como o impacto da política de austeridade no investimento do Estado nesta área.

Tabela 1 – Despesas do Estado Português em Educação (total e em % do PIB), 2000 – 2014

Year	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14
Euros (millions)	6.202,6	6.729,8	7.276,7	7.005,0	7.132,1	7.316,1	7.263,4	7.232,1	7.348,6	8.507,4	8.559,2	7.878,5	6.622,4	7.108,4	6.959,1

% of GD P	4,8	5,0	5,1	4,8	4,7	4,6	4,4	4,1	4,1	4,8	4,8	4,5	3,9	4,2	4,0 *
-----------------	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	----------

*Prevision

Source: Eurostat

A Tabela 1 permite verificar como o investimento público em educação foi progressivamente crescente entre 2000 e 2007, acompanhando a dinâmica de expansão do sistema. O advento da crise económica e financeira de 2007/8 é correspondido, primeiramente, com o aumento do investimento público em Educação, passando de um valor de 7.232,1 milhões de euros em 2007 para 7.348,6 em 2008 e 8.507,4 em 2009. Esta opção surge em conformidade com a primeira fase de orientações europeias para responder à crise com estímulos à economia, por exemplo, em Portugal, através do programa de modernização do parque escolar e do Plano Tecnológico na Educação.

Com a introdução dos pacotes de austeridade a partir de 2010, que constitui a segunda fase deste processo, verifica-se a redução do investimento público, visível na progressiva redução da despesa entre 2010 e 2013, que passa de 8.559,2 para 7.108,4, prevendo-se ainda uma descida para 6.959,1 milhões de euros em 2014. Esta mesma tendência pode ser verificada através da análise da despesa do Estado em percentagem do PIB. Em 2009 a despesa iguala o valor máximo deste século, cifrando-se nos 4,8%, caindo progressivamente nos anos seguintes, registando um valor de 4,2% em 2013.

No plano dos conteúdos, a inversão de políticas no sentido da introdução de uma agenda educativa conservadora, traduziu-se num conjunto de medidas de que se destacam:

- Adult education: Termination of the “Novas Oportunidades” programme and lack of alternative effective measures.
- Human resources: Significant reduction in numbers of teachers;
- Policies termination: Integrated training programmes such as the “Plan of Action for Mathematics”; Student support measures and scholar success promoting: Extracurricular areas such as “Accompanied study”; The “citizenship education”, course, which provided the time for schools developing different kinds of activities and projects; Ending of the Program of modernization of the buildings; Ending of the technological plan for education;
- Budgetary measures: Increasing the number of students per class; Reduction of the number of Teachers; Asymmetrical treatment on funding regarding with the reinforcement of the private sector education (“association contracts”);
- System design: Introduction of mandatory national exams at the end of the first and second cycles of basic education (9 year-olds & 11 year-olds); Introduction of “vocational courses”, partially inspired in the German dual system, addressed for children aged 12 years old in risk of school failure, creating from very early stages a system with two separate tracks.

Note-se que estas medidas, que visam na sua base a seletividade social dos alunos em fases cada vez mais precoces dos seus trajetos escolares, são implementadas num quadro em que as instâncias europeias recomendam a melhoria dos níveis de educação, “em particular procurando reduzir a taxa de abandono escolar para um nível inferior a 10% e aumentando para pelo menos 40% a percentagem da população na faixa etária dos 20-34 anos que conclui o ensino superior ou equivalente” (Conselho Europeu, 2010: 12).

As evidências recolhidas mostram, portanto, que apesar de um discurso oficial de promoção das qualificações, o resultado líquido das políticas para a educação e formação consistem na redução do investimento e na inversão das políticas que estiveram na base da convergência verificada. Assiste-se, sim, à subordinação da educação e formação às soluções macroeconómicas para a crise e para o futuro político e económico da Europa. Nesse sentido, importa refletir sobre a articulação entre a crise, a interrupção das políticas que promoveram a convergência dos países do sul da Europa e o processo de rotulagem a que temos vindo a assistir desde 2008. Ainda sem tradução em indicadores como o AEP, o PISA ou a conclusão do ensino superior, há porém sinais claros do impacto negativo da viragem política. Segundo o Conselho Nacional de Educação a retenção escolar (o melhor preditor do futuro abandono) cresceu de para xxx, ao passo que, pela primeira vez nas últimas 4 décadas, o número de candidatas à entrada no Ensino Superior reduziu-se em x número de alunos no ano letivo de 2015/2016. Já vimos, por outro lado, como o indicador da ALV desceu de x para y, passando o número de pessoas a frequentar medidas de educação/formação de ...mil em ... para não sei que miséria em ... Não porque o programa de austeridade o determinasse, mas apenas porque o governo não viu interesse na educação e formação de adultos em larga escala.

5. Conclusão

Como demonstrámos através da análise estatística, o rótulo agregador dos países do sul num modelo político-institucional específico tem pouca correspondência com a realidade das respetivas sociedades, dos seus sistemas educativos e formativos e do respetivo desempenho. Apesar de partilharem uma trajetória de convergência com os padrões de referência europeus, a forma como percorreram esse trajeto é bastante diferente entre si. Mais, a análise dos indicadores permitem-nos verificar que o agrupamento destes países como uma realidade única e indistinta não tem consistência analítica.

Esta tendência de convergência consolidada nas últimas décadas encontra-se agora em risco face à imposição de medidas de austeridade, o que nos remete para o âmago da rotulagem dos povos destes países como preguiçosos, como supostamente demonstraria a “resistência” à qualificação (rotulagem que faz parte do *tag PIGS*). Efetivamente, o que se pretende com esta rotulagem é a imposição e solidificação de uma narrativa sobre a crise e, mais importante, sobre o que deve ser a solução para a crise. Esta narrativa pretende explicar a crise pelas falhas dos países da Europa do Sul, cuja resistência à qualificação tornaria as suas economias menos competitivas e, logo, as suas finanças públicas, incluindo as políticas de proteção, menos sustentáveis.

Mas esta narrativa choca com a verificação do esforço de convergência educativa, o que obriga a encontrar noutros fatores, provavelmente associados ao sistema financeiro, ao perfil de

especialização económica e à discriminação prevalecente nos agentes dos mercados (Ref²), a explicação para a intensidade com que foram prejudicados pela crise e pelas políticas de austeridade.

Mesmo assim, pelo menos por enquanto, não são visíveis nos indicadores de desempenho dos sistemas de educação destes países os impactos negativos que se verificaram no plano orçamental. Na verdade, nos casos em que já existe evidência, tudo parece apontar, antes, para uma maior influência da orientação ideológica dos governos no estabelecimento das prioridades políticas e nos respetivos resultados.

The “education quality” policies in Southern Europe and its impacts over teachers’ and students’ lives

Pedro Abrantes, Universidade Aberta e CIES – Instituto Universitário de Lisboa

Sofia Amândio, CIES - Instituto Universitário de Lisboa

Susana Martins, CIES - Instituto Universitário de Lisboa

João Sebastião, CIES - Instituto Universitário de Lisboa

Rafael Feito Alonso, FCPyS - Universidad Complutense de Madrid

In this article, we analyse the policies for the promotion of education quality, launched during the last decade, in Portugal, Spain, Italy and Greece, focusing particularly on the development of external mechanisms of monitorization and assessment, as well as on its impacts over teachers’ and students’ lives. This work is part of a wider project, titled *Educational Challenges in Southern Europe. Equity and Efficiency in a Time of Crisis*, financed by Fundação para a Ciência e Tecnologia, coordinated by João Sebastião (CIES-IUL) and involving 14 researchers, in the four countries.

This article includes five sections. Firstly, we discuss how the management principles are being introduced in the educational policies, all over the world, during the last decades, as well as the criticism and resistance raised among the educational communities. Here, we will focus the importance of the assessment systems over schools, teachers and students. Secondly, some remarks on the comparison between education policies in Portugal, Spain, Italy and Greece are sketched. Then, the article analyse if (and how) quality management policies are reframing educational experiences in these four countries, focusing on schools evaluation.

1 Quality, education management and education policies

If educational policies were dominated throughout the 20th century, all over the world, by concepts as universal access, development and equality, from the 80’s on, there is a growing emphasis on concepts as quality and assessment. This doesn’t mean that the latter concern is necessarily opposed to the former, and the most enthusiastic actually sustain this is an essential path to achieve the former orientations, but one shall accept that there is a new approach.

Such approach, as it is happening also in other traditionally public sectors of the welfare systems as health or social security, is clearly influenced by the management framework, not only in the way efficiency is pursued in the use of the minimum resources to maximize de goal achievement, but also as education and the agents involved are conceived: education as a service to be provided; parents, teachers and principals as users, providers and managers. Although there is a discussion over in which measure the ultimate goals are specific for education and/or for the public sector, the tools used to reach them are based on developments taking place in the management field. Therefore, quality – a vague concept that everybody agrees with – is systematically used as a way to legitimate standardized assessment programs over students’, teachers’ and schools’ performances, carried out by international organizations, national governments or external agencies, enabling the conversion of learning and teaching in tangible products (Sallis, 2005). Educational quality is then presented as a duty

of educational professionals and institutions (the providers), and simultaneously as one of the main parents' right (the users), as well as a key for economic growth and social development, although such relation is not always evident.

Although such changes were documented (and often criticized) by scholars in many countries, during the last decades, usually taken as part of a "global agenda" (Popkewitz, 1991; Carnoy and Rothen, 2002; Teodoro, 2008), dominated by capitalist and neoliberal forces, it is not evident that education policies are converging all over the world, and that their outcomes for students and teachers are homogeneous, even within Europe (Martins, 2012). As noted by Archer (1979) or Petitat (1982), education policies are the result of the interaction between multiple agents and forces, acting at different scales levels. Or, as Stephen Ball (1998) put it, there are common elements in contemporary international policies, but one shall also examine the translation and recontextualization processes, at national and local levels.

Besides, it is particularly useful to analyse the recent developments taking place in educational assessment in Portugal, Spain, Italy and Greece, at least for three major reasons.

Firstly, avoiding moral judgments, this new agenda introduces a huge shift in the way education was socially constructed, in the Southern Europe we are not sure that we can state that there is a specific way of building educational systems in Southern Europe. Rooted over the influence of religious and military institutions, educationalists gave sense to their work and position in the world, based on a humanist and illuminist ideology I think this sentence needs to be nuanced. In the Spanish case the influence of Church is undeniable. Nevertheless, since the beginning of the democratic period –starting in 1977- the state has invested quite a lot in the educational system. So, although, the Church counts a lot (most of the private state-funded schools belong one way or the other the church) there are other stockholders to take account of. Schools and teachers were those who were taking civilization and culture to the people But, this has been the case for every country in Europe. Obviously, the authoritarian regimes during the 20th century (in Portugal, Spain and Greece these regimes lasted until the 1970s; in Italy, it was particularly severe in the 1930s and 1940s but it was abolished after the II World War) developed strong systems of control, but they were based on political and moral concerns, and the expectations of many educationalists was that they would be removed in a democratic era. In the Spanish case, there was a huge generational change. Most of the secondary education teachers enter the teaching profession at the very beginning of the democracy, in the late 70s. Besides, the development of educational systems in these countries was considerably delayed, in comparison with the other European countries, and it occurred through a state-based, centralized and nationalist framework, highly influenced by the Church, especially in Spain (Enguita, 2001).

Secondly, the economic crisis from 2010 on was particularly severe in these countries. We think this is the feature that Southern countries share the most. Anyway it hinges on the political party in office. Things have changed, mainly for worse, since december 2011 when the right wing Popular Party won elections. Before that no sever slashes took place in education, and its effects over education policies are not lineal. On the one hand, the national states became more vulnerable to European Union and other powerful international organizations, so that pressures to accelerate "structural reforms", in order to reduce costs and to improve efficiency in the public sector, to expand the markets and to attract external investment, were magnified. But we must be aware that the Troika does not indicate where to slash. On the other hand, the European Union orientation to increase investment in education and to achieve ambitious goals of universal education was a landmark for the education development

in these countries during the last decades, it was reinforced by the Lisbon Agenda, in 2000, and it was not abolished since the beginning of the economic crisis. Moreover, the huge cuts over education (as well as other sectors) and the permanent political instability generated by such austerity policies since 2010 has affected the (economic, social and political) viability of some reforms that were planned or already taking place.

And thirdly, one shall not take for sure granted that educational trends are homogenous in these four countries. Although Portugal, Spain, Italy and Greece are currently considered taken as similar in many international debates, especially at European level, this eludes the important differences between them. For instance: (a) in Portugal, Spain and Greece, authoritarian regimes ruled until the late 1970s and EU integration just occurred in the 1980s, but this is not the case for in Italy, (b) the Catholic Church is traditionally powerful in Portugal, Spain and Italy, but in Greece the Orthodox Church is dominant; (c) Portugal and Greece were committed (and supervised) during the recent years by an international financial assistance program; (d) Italy and Spain are bigger countries where the public systems, including education, are partially organized by regional structures; (e) governmental instability during the last years was higher in Greece and Italy, than in Portugal and Spain; (f) and so on. One shall wonder if some of these factors have influenced the educational policies, especially on assessment measures.

2 The economic and the humanist perspectives on education quality in the frame of education policies

Globalization is a heterogeneous force, with different effects on education, either within or between countries (Dale & Robertson, 2002). The Europeanisation of education and the emergence of a European Education Policy Space (EEPS) (Lawn 2006; Jessop et al 2008; Ozga et al. 2011; Grek et al 2013; Martins, 2014) must be seen in its internal diversities (Martins, 2012). Quality parameters becomes more relevant in the new socio-economic order (Mainali, 2011).

In Europe, quality is conformity with standards data to monitor performance in education. The preoccupation with quality assurance and evaluation drives means of standardizing and harmonizing education policy and practice (Ozga, 2011). Most European countries have Inspectorates of Education to assess the quality of public schools. In general, the aims are to guarantee a minimum quality level of education, to improve schools quality and to identify underperforming schools (Timmermans, et al, 2015).

In this point, we will retrace the genealogy of the understanding of 'quality education', starting by taking into account two main perspectives, identified by Barrett and Tikly (2001) and Barrett et al (2006): first, the economic and business perspective; second, the progressive or humanist perspective. The first one focuses mainly on the school organizational level. The second one focuses mainly on students classroom level and teacher-student relationship.

These two perspectives are not immune to internal critics. Models are therefore upgraded in a non-Manichean way. In the economic view, Robertson & Dale (2015) develop a Critical Cultural

Political Economy of Education. Cook (2007) tries not to forget the centrality of students performance in the education system. Lima (2013) underlines the humanizing process of the management ideas applied to school organizations (Lima, 2013). On the other hand, critical pedagogy and critical social studies applied to education try to enhance the democratic citizenship project of students leaning transformation. Both perspectives, humanist and economic are going through internal critics, their programs and principals remaining empirically unfulfilled, in what students satisfaction, success and transformation is concerned.

First of all, the economic perspective argues that quality education is achieved through quality management mechanisms, similar to those in the business world (Rinehart 1993; Schmoker and Wilson 1993). The World Bank stands for quality of education mainly from the standpoint of economic growth (Hanushek, Wößmann, 2007).

The import of management logics in the education field is usually situated in the 1950s, when Jesse B. Sears (1950) studies the nature of the administrative process in education, inspired by Taylor, Fayol, Gulick and Urwick, among others.

The idea of school-based management has been present in thinking about educational whole reform since the 1960s (Comer, 1988). School-based management really took off in the USA in the 1990s as a method for a school radical change, pervading the administrative, pedagogic and external relations domains of school life (Mohrman, 1994). School-based management strategies hold the promise for increasing organizational effectiveness through the perspective of an organizational model, originally used in the private sector. The “high-involvement” model (Lawler, 1986) has been used to help members of organizations become involved in improving organizational performance.

School management “is an increase in decision-making at the local school level” (Mohrman, 1994). It stands for local school participants to improve their schools, with interdependence between government (national or local), school’s administration and teacher classroom behaviour. School management increases the flow of power downwards within the school, requiring teachers or their representatives to serve on whatever bodies decide about school needs and the reforms to endorse.

The assumption is that not all reforms can be fully funded from the public budget. School management is associated with adding school resources by voluntarism of parents who spend time in schools or donate money, soliciting local businesses for cash and in-kind services, finding funds from other civic organizations or socially organizing to lobby government.

In particular, greater parent involvement will mean more responsive schools and decisions taken in the interests of children rather than adults. Involved parents will become unpaid or minimally

paid auxiliary staff who help teachers in classroom, libraries or during field trips. The quality of social relations among staff, among students and between staff and students is the desirable social climate in the name of student cognitive achievement increasing (Cook, 2007).

School-based management uses measurable benchmarks on a short-term basis. Annual evaluations are needed to overall quality of implementation and of changes in student performance. Their purpose is to see how much progress is being made towards organizational goals, for school management is about organizational change.

Children should acquire foundation skills: literacy, numeracy, reasoning, social skills, advanced skills throughout life. Quality is usually interpreted as conformance to some pre-set quantifiable indicators or standards (Klees 2002).

School management implies decisions with school-wide scope. It is less relevant to efforts targeted at specific demographic groups in the school, like children who are poor, a given racial group, or performing above a certain performance level, or classified as learning disabled (Cook, 2007). We would add that school management, like management discourse, is therefore based on the myth of non-stratified societies (Amândio, 2007).

The context surrounding this change is so variable that one school is not likely to look like another's, and so, evaluations of a single model will also require large samples of schools. Faithful implementation is bound to be difficult because of between-school complexity and heterogeneity, making the study of implementation quality especially important in research on school based schools.

From the 1970s, Thomas Greenfield suggests the redirection of this perspective, focusing on people and their actions instead of organizations. Schools are not industries or companies but social institutions for social change. Greenfield is regarded as one of the pillars of educational management (Lima, 2013), i.e., the effort for conceiving postures and professional actions consistent with humanity itself. The great challenge of schools today is claiming substantial qualitative changes. We then suggest that the economic and business perspective on education follows the "humanization process of the management discipline" (Thuderoz, 2006; Amândio, 2014).

All this would allow us to infer that within the economic perspective, quality education is not achieved through this model. The internal change of management schools of thought goes through permanent updates generated by internal critics among different cycles of ideas and perspectives (Boltanski & Chiapello, 1999). In this sense, inside the business perspective, school-based management is criticized as "a concept of modest entity" (Cook, 2007), lacking

pedagogic component. There is little empirical evidence supporting a link between school management and improved school performance. School management effects on student achievement are modest. Furthermore, adding managerial roles and responsibilities to a teacher's life is not universally valued. Parents and community members have roles to play, but these roles are not always clear nor central.

Contributing to an even stronger critical view, Robertson & Dale (2015) propose a Critical Cultural Political Economy of Education. Drawing on critical realism, arguing for a critical theory forming a basis for social change. This is very important for any study of education in that it is a powerful institution of social reproduction in societies. It matters how it is organised/organized, and what the outcomes or effects are for individuals and the collective - basic questions of social justice and social change.

The second perspective on quality education, the humanist perspective, considers customer-driven quality management models from the business sector break down when students are compared with business customers. Quality education models require wider considerations of stakeholders: students, teachers, parents, society, business (Srabec 2000; Ng 2003; Ozga, 2011, 2012; Gelatti & Marquezan, 2013).

Evaluation for social transformation is this perspective's main principle. The humanist perspective is sensible to cultural differences, political and ethical, interdisciplinary, critical and reflexive, democratic. It promotes social participation and encourages evaluation pedagogy (Murillo & Hidalgo, 2015).

In the mid-1800s, Horace Mann's idea of the common school theorized an educational experience. Educational theory was later enriched by Dewey's pragmatism, for whom quality education was elusive. Until the empiricist tradition in educational research constructed a theory of experience (Dewey, 1938, quoted in Leonardo, 2004)

Paulo Freire (1970) is without question the most influential theorist of critical or liberatory education (Weiler, 1994), and has become synonymous with the very concept and practice of critical pedagogy (Giroux, 1993). Freire gave education a language that neglected neither the effect of oppression on concrete people nor their ability to intervene on their own behalf, nor the terrorizing and structured consequences of capitalism and other systems. Freire believed in liberating power critical intelligence rather than passive reception of information becomes the practice of freedom, the means by which students deal critically and creatively with reality and discovers how to participate in the transformation of their world.

Within the humanist perspective, we identify a strong relation with Critical Social Theory and critical pedagogy. Focusing on the classroom level, there is a critical form of classroom discourse. With the benefit of Critical Social Theory *mélange* with Education (Marras & Le Compte, 1999; Morrow & Torres, 1995), classroom discourse broadens students' horizon of possibility, expands their sense of a larger humanity, and liberates them from the confines of their common sense (Leonardo, 2003). The multidisciplinary knowledge base of Critical Social Theory affirms the role of criticism as bound up in the definition of a quality educational experience (Leonardo, 2004). To improve the nation's education system, we need to revamp

the teacher-student relationship and teaching learning processes for quality education (Mainali, 2011).

To the humanist critical perspective, educational discourse not only frames the way students experience learning, it may also empower them. Quality education begins with a language of critique. Criticism is not valued in and of itself but as part of an overall project that aims at material or institutional changes, a process which begins with a language that penetrates the core of relations of domination, such as race, class, and gender (Leonardo, 2003, 2004). Although different forms of Critical Social Theory debate the nature of oppression (taking its cue from Bell, 1992) converging on the idea that social inequality is persistent, subverting students' full learning potential.

Readers of critical social theory in education are accustomed to discourses with politicized phrases, such as "pedagogy of the oppressed" (Freire, 1993), "predatory culture" (McLaren, 1995), "education under siege" (Aronowitz & Giroux, 1987), and "teaching to transgress" (hooks, 1994) among others (Apple, 1990; Gore, 1993; Bartolome & Macedo, 2001; Allen, 2002; Cherryholmes, 1992).

Self-assessment has assumed prominence in education circles as an effective means of helping students develop a myriad of qualities. These include improved self-esteem, enriched self-concept, self-empowerment, autonomy, higher achievement, persistence, more in-depth understanding (Boud, 1986 & Sadler, 1989, cited in McDonald, 2008, p.38).

Successful classrooms are those that encourage students to think for themselves and engage in critical thinking. Students who think critically are excited about their learning. We can define critical thinking as consciously observing, analyzing, reasoning and evaluation according to proven standards (Mainali, 2011).

This humanist and critical notion of quality education encourages students to become aware of social injustice, confronting social inequality. Students must have access to questions about the new world order, a process assisted by theory informed perspectives on students' social experiences (Leonardo, 2004).

Quality of education is determined by the development of total personality of the students (Mainali, 2011) and, in this sense, means the actual participation of peoples in the making of human life (Said, 2000).

Not only does it deploy the politically edgy phrases cited above, but critical social theorists are also accustomed to optimistic phrases, such as pedagogy of hope (Freire, 1994), pedagogy of love (Darder, 2002), care of the self (Foucault, 1986), democracy and education (Dewey, 1916; Fraser, 1997), search for a critical pedagogy (Greene, 1986) These developments have benefited from earlier preparations at the Frankfurt School and the Birmingham Center for Contemporary Cultural Studies, among others.

Quality education is, from this point of view, the product of a struggle for freedom during the pedagogical interaction where both teacher and student play the role of critic (Giroux).

Social functions of school must focus on how to form critical and reflexive citizens, prepared to the future (Abrantes, 2003). For this, school must suffer structural and organizational changes, in order to gain more flexibility and more coherence with the required proposal (Alonso, 2003).

School, due to its organization, despromotes its potencial as a space for citizenship (Abrantes & Quaresma).

In order to maintain quality in education, it is necessary that there is quality in content and methods of teaching, management of educational process, what the students learn, and how to adapt education to changing needs through innovation (Coombs, 1968, cited in Ranjit, 2004). Quality education today has been defined from several perspectives: access, equity, equality, full participation, inclusion, integration and empowerment. Satisfaction replaced excellence to denote quality since the beginning of 21st century (Kafle, 2010). Educational professional must be aware of the fact that the commercial quality program will not work in education (Mainali, 2011)

The great challenge for the humanist ant economic perspective, is to find practical ways to relate pedagogic principals with organization principles (Possebon & Valeda, 2013).

3 Monitoring education in southern Europe

Quality-based educational policies were carried out in Portugal, Spain, Italy and Greece during the last decade. A common standpoint is that national assessment systems in the four countries were weak during the previous decades, characterized by a huge increase in the number of educational institutions and professionals. However, according to our data analysis, there are considerable differences concerning the intensity of such policies and also the programs carried out in each country to achieve “quality”. Though a European Qualifications Framework has been developed, only in higher education, after Bologna settlement, it is possible to observe a consistent process of convergence concerning the assessment of institutions and graduations, in the four countries. Still, such assessment system appears to be focused in so far on formal aspects of institutions, teachers and graduations, rather than over learning patterns and outcomes. In basic and secondary education the evolutions taking place are more diversified.

In Portugal, quality became a key concept in political agenda from the 90s as it is the case in Spain since December 2011, especially in relation to a strong criticism over teachers in the media. From 2005 on, national programs for assessment of schools, teachers and students were carried out, through very different methodologies and the relations between them are not evident. Although students’ scores in PISA tests have increased considerably during the last decade, such assessment systems were a huge focus of controversy. Especially, the assessment of teachers which PISA do not do generated massive demonstrations in the streets and it was partially removed, not being clear their effects over the improvement of teachers’ pedagogical practices. Meanwhile, while schools evaluation system is often neglected, national exams over students in the end of each educational stage are used by the media to generate annual rankings of schools, contributing for competition between schools, pressure over teachers and stigmatization of those with lower scores. From 2011 onwards, under a right-wing government with a more conservative view of education, national exams were reinforced, and they were criticized as a mean of pressure over teachers and children, back-to-basics orientation, exclusion of vulnerable groups and increase of retention rates.

The Spanish education has a regional autonomy within a centralized framework. It is a relatively decentralized system. Through the Ministry of Education, Culture and Sport (*Ministerio de Educación, Cultura y Deporte, MEC*), the central government designs the legal framework regulating the principles, objectives, and organization of the different school levels, as well as a proportion of the contents and subjects studied. Ministries (or departments) of education from the 17 regions develop and manage their education systems based on these guidelines. Other bodies also shape education policy. But the new education law (which is quite likely to be overthrown after the coming elections to take place next December) set forth exit exams (test actually) at the end of primary education and lower and upper secondary education. The regional government of Madrid publishes the results of a test passed to sixth degree pupils.

Italy, compared to other EU countries, is characterized by underdevelopment in terms of monitoring and evaluation practices of the educational system. However, the demand of evaluation of the educational system in Italy increased over the last ten years (Fondazione Giovanni Agnelli, 2014). First, the disappointing results collected by OCDE PISA 2003 about Italian students compared to international data. Second, the increasing autonomy of schools that required a wider control from central authorities. Third, the Philosophy of the New Public Management. According by Brunetta Law (n. 15 / 2009) the work of all public administrations has to be evaluated according to efficiency criteria. Forth, the effects of Internet Culture: families require more information and data on the quality of schools in order to make the correct school choice.

The Greek education system has been monitored according to the principles of public management until today. The formal education system is wholly managed and controlled by the ministry of education. There is little autonomy given to schools and these only refer to extracurricular events and other such activities. The lack of autonomy at a large scale goes today hand in hand with evaluation perceived more as an instrument of control than of attempting to improve the education system. Changes related to evaluation and quality assurance were introduced in 2005 and 2007 and started being implemented at a large scale after the law 4009/2011.

4 School evaluation

According to a recent Eurydice Report (EACEA, 2015), external school evaluation is carried out in most European countries, although a great diversity of models is in use. In Southern Europe, such heterogeneity is apparent. This report concludes that while in Portugal and Spain there are national systems of school evaluation, in Italy there is also a pilot project and in Greece (as for instance in Finland) there is no national system for the schools evaluation. Besides, the Portuguese system is considered the most complete one, among this group, since the external evaluation is developed by a team of inspectors and other experts in education, school teachers, pupils and community participate in the evaluation process, external evaluation is linked to the self-evaluation, the school board is consulted before the end of the evaluation report, and the each school external evaluation is publicly disseminated. For instance, in Spain, the external evaluation is carried out by the Inspectorate, but community members are not consulted and the evaluation reports are not public.

In parallel to the international evaluations, national Law n.º 31/2002 defines the non-high education evaluation system (pre-school, basic and secondary education) in Portugal, based on

self-evaluation in all schools, and external evaluation – with multiple initiatives from private and public entities, not rarely related to the existing international evaluation assessments. After some experimental programs, the schools evaluation system was launched in 2005 and it was developed during the last decade by the General Inspection for Education (IGE), linked to the school autonomy policies (Coelho, Sarrico, & Rosa, 2008, Sarrico, 2014). It was influenced by school evaluation systems in other European countries, especially in Scotland, but it was also carried out in the context of the media annual publication of the “rankings of schools”, based on the average scores of students in national tests.

The corresponding advices and recommendations of CNE from 2006-2011 evaluation focused in autonomy and participation issues, and can be divided in three moments. Firstly, the Parecer n.º 5/2008 (of 13th June) underscored negative effects of school rankings but giving importance in continuing the schools’ evaluation model and the different responsibility levels within the system – local, regional and national, while coordinating auto-evaluation with the external one. Secondly, the CNE Parecer n.º 3/2010 (of 9th June), recommending the extension and deepening of the consultation mechanisms, namely reinforcing the municipalities and parents participation. Finally, the n.º 1/2011 CNE Recommendation (of 7th January), focusing on the three main aims of schools’ external evaluations: the training of the school community; the regulation allowing elements that support schools’ decisions; the participation of all elements in schools through a formative perspective that reinforces auto-evaluation. Last but not least, these recommendations raised the need to include private, cooperative and solidarity networks, in complement with external evaluation. In sum, focusing the attention on students as well as on the need to adapt the trajectories proposed by the system, they define these priorities in close relationship with the local community, thus, calling different agents for their responsibilities while reinforcing also the need for social certification, efficient management of the existing resources and of the regulation mechanisms producing relevant information.

However, there seems to exist, still, an apparent homogenization of schools in the external evaluation reports, which contributes to the social construction of schools strongly dependent from policy measures and administrative choices for their management and organization. Such construction of a specific school model has shown potential effects in segregation schools accordingly to the evaluation results, when it should, on the contrary, contribute to improve the school activities, and learning practices (Velooso, Abrantes & Craveiro, 2011).

Indeed, in Lemos (2014) view, schools’ external evaluations may lead to two essential functions, retroactive information, meaning creating monitoring practices to adapt policies and the management of the pedagogic process, as well as social certifications, i.e., creating social trust in society. Lemos (2014) sustains that the current national evaluations have been the main changes of educational policies possible to be identified in the short term. As also expressed in Velooso, Abrantes & Craveiro (2011), Lemos also argues that current national examinations, being currently based on tests in the end of each cycle and national exams, give considerably more priority to the social impact of school certification, producing, thus, external and irrecoverable information. This is so because, the author continuous, such external evaluation does not allow to act upon the learning process of the students under evaluation (because it does not allow retroactive actions) and, consequently, being of no use to work on the need for school’s equity. In this sense, these are mechanisms to promote social trust because certificating knowledge but not allowing to convert and transform the outcomes – exams do not improve education quality as they do not allow to act upon the conditions that

promote their outcomes. And even if social trust may in some cases improve, this occurs at the cost of quality and equity mechanisms and needs. Thus, national evaluations have become, in this sense, less efficient in terms of resources management, and its consequences in terms of society transformations on equity. Differently, international evaluations have allowed mechanisms to improve the quality of the system, in terms of resources efficiency and access. Indeed, many of the improvement of equity conditions for education access have resulted from OECD pressures and the common international indicators (IIEES, through their studies and recommendations, though experiencing significant internal resistances).

In Spain, most schooling decisions are taken by the regions or the central government (approximately 43% of decisions in lower secondary education), and about one-quarter of decisions are taken by the schools themselves. Regional authorities have responsibility for organizing and delivering education and maintaining schools, and for decisions on funding (including teachers' salaries), on part of the curriculum, among others. Targeted capacity-building at these levels to support decision-making and implementation of these decisions can help to promote better results. School Councils (*Consejos Escolares*), which formally participate in decision-making in schools, include representatives of the teaching and student body, the town council, parents (slightly more than a tiny ten percent of them vote for selecting their representatives) and non-teaching staff. In vocational training schools, the councils might include representatives from labour institutions or employers' organizations.

In Italy, despite the Law n. 59 /1997 which ruled the school autonomy, schools have little autonomy over matters such as hiring teachers, dismissing teachers, formulating the school budget and deciding its allocation within the school³⁸, comparing to other OECD countries. According to the Eurydice Report (2009), if we consider the autonomy of schools in accessing and utilizing public funding, Italian schools report a full autonomy concerning the purchasing of ICT technologies and in the operating expenses, but a total lack of autonomy concerning properties purchasing. On the contrary, Italian schools benefit from a wide autonomy in accessing and utilizing private funding, that can be allocated to many functions such as acquiring goods, hiring teaching staff for extra-curricular activities. Instead, schools benefit from a full autonomy in defining the optional curriculum, even if teachers are not alone in this decision-making process but they are expected to work in team with the rest of the teaching staff and to follow local and regional guidelines. Schools are instead fully autonomous in terms of educational methods and schoolbooks choice.

Together with the raising of the school autonomy in Europe, the need for accountability has increased as well. Nevertheless, accountability practices in Italy are still very rare and backward, leaving the country at the margins of this tendency towards external evaluation systems. Thus, schools in Italy are not compelled to account for their own work in front of external actors, even if they are strongly fostered in promoting internal evaluation.

In Greece, the internal evaluation of every department is followed by an external organization. The relevant committee of the external evaluation is comprised by academics from universities abroad, who understand the Greek language. All the relevant reports are published on the internet page of the institution (see www.hqaa.gr). The criticism addressed to such a concentrated system is manifold. It is worth noting that the law of 1985, which was

³⁸ 86% of students attend schools whose principals report that only regional and national education authorities have the responsibility for selecting teachers to employ (compared to 24% across OECD countries). Furthermore, 78% of students in Italy attend schools whose principals report that only regional and national education authorities are responsible for firing teachers.

considered a landmark for introducing democratic structures of governance in schools, permits various civil society and professional organisations (e.g. farmers', workers', middle business' etc.) to write reports or recommendations addressing them to the education authorities. This seemingly democratic measure, means according to some authors that actually no one has the responsibility to do so (see Kantzara 2001: ch. 3).

A significant part of running an education system is to have statistical information. Availability of statistical data has been improved considerably *after 2012*; part of it is due to the measures issued conforming to the 'Memorandum of Understanding' agreement with the troika which promotes 'transparency' in the public sector. Still statistics are not up to date on a number of subjects, and most notably on education.

It was thought that one of the main mechanisms to combat corruption and facilitate public control over finances and other aspects has been to make public every decision made by public authorities; for this purpose there is a site on the internet, called '*diaygeia*' (transparency). This measure has already bared some fruits as very often one can read articles that judge public spending, but this is another issue and we put aside for the moment.

5 Final remarks

In this article, we sketched the major changes in the education assessment system in Portugal, Spain, Italy and Greece, during the last decade in a globalized world. Our main idea is that, in spite of significant divergences between countries, there was in all of them a reinforcement of the management systems of monitorization and assessment, based on a restrict restrictive or tight concept of quality and hardly able to generate an effective improvement of quality of teachers' and students' work. As a compensation for huge cuts in public education budgets, such mechanisms has generated an intensification and standardization of teachers' and students' work, focused on a limited set of skills and only assessed in the short-term.

Still, our analysis does not confirm the homogeneity thesis. Actually, assessment systems carried out in these countries are clearly distinct and although international pressures and trends were important in their development, they are following different models.

Besides, especially in Greece, but in some measure in the other countries too, the austerity policies blocked the economic and political conditions to settle consistent and constructive assessment programs, not only because such they require a considerable investment, but also because in a such a context they are not able to reward and to support school agents, but they are conceived as a tool to stress and to dismiss them.

References (phase 1 of the article)

- Abrantes, Pedro (2010), "Políticas de avaliação e avaliação de políticas: o caso português no contexto ibero-americano", *Revista Iberoamericana de Educación*, 53, pp. 25-42.
- Afonso, A. J. (2001). Políticas contemporâneas e avaliação educacional. In Lima, L & Afonso, A. J. (eds.), *Reformas da Educação Pública: Democratização, Modernização, Neoliberalismo*, Porto, Afrontamento, 111-127.

- Archer, M. (1979). *Social origins of educational systems*. Londres: Sage.
- Ball, S. (1998). Big policies/small world: an introduction to international perspectives in education policy. *Comparative Education*, 34 (2), pp. 119-130.
- Carnoy, M., & Rothen, D. (2002). What does globalisation mean for educational change? *Comparative Education Review*, 46(1).
- EACEA (2013). *Key data on teachers and school leaders in Europe. 2013 Edition*. Brussels: EACEA.
- EACEA (2015). *Assuring quality in education: Policies and Approaches to School Evaluation in Europe*. Brussels: EACEA.
- Enguita, M. (2001, 2007). *Educação e transformação social*. Mangualde: Edições Pedagogo.
- Martins, Susana da Cruz (2012), *Escolas e Estudantes da Europa: Estruturas, Recursos e Políticas de Educação*, Lisboa, Editora Mundos Sociais.
- Petit, A. (1982). *Production de l'école, production de la société*. Genebra: Droz.
- Popkewitz, T. (1991). *Sociología política de las reformas educativas: el poder/saber en la enseñanza, la formación del profesorado y la investigación*. Madrid: Morata.
- Sallis, E. (2005). *Total Quality Management in Education*. 3rd edition. London: Kogan Page.
- Coelho, Inês, Cláudia Sarrico e Maria João Rosa (2008), "Avaliação de escolas em Portugal: Que futuro?", *Revista Portuguesa e Brasileira de Gestão*, 7 (2), pp. 56-67.
- Teodoro, A. (org.) (2008). *Tempos e andamentos nas políticas de educação*. Brasília: Liber.
- Leonor Lima Torres & José A. Palhares 'Estilos de Liderança e Escola Democrática'
- Duque, L.C. (2013). A framework for analysing higher education performance: Students' satisfaction, perceived learning outcomes, and dropout intentions. *Total Quality Management & Business Excellence*, 25(1-2), 1-21.
- Phillip Brown & Hugh Lauder (2006) Globalisation, knowledge and the myth of the magnet economy, *Globalisation, Societies and Education*, 4:1, 25-57, DOI: 10.1080/14767720600555046
- Sotiria Grek, Martin Lawn, Jenny Ozga & Christina Segerholm (2013) Governing by inspection? European inspectorates and the creation of a European education policy space, *Comparative Education*, 49:4, 486-502, DOI: 10.1080/03050068.2013.787697
- Jenny Ozga (2012) Governing knowledge: data, inspection and education policy in Europe, *Globalisation, Societies and Education*, 10:4, 439-455, DOI: 10.1080/14767724.2012.735148

The Varying Effects of Regional Organizations as Subjects of Globalization of Education
Author(s): Roger Dale and Susan L. Robertson Source: Comparative Education Review, Vol. 46, No. 1, The Meanings of Globalization for Educational Change<break></break>Guest Editors: Martin Carnoy and Diana Rhoten (February 2002), pp. 10-36

Jostein Langstrand, Peter Cronemyr & Bozena Poksinska (2014): Practise what you preach: quality of education in education on quality, Total Quality Management & Business Excellence, DOI: 10.1080/14783363.2014.925290

Antonio Goucha Soares PhD (2010) THE EUROPEANIZATION OF PORTUGAL, European Societies, 12:3, 317-337, DOI: 10.1080/14616691003735514

The quality of teaching staff: higher education institutions' compliance with the European Standards and Guidelines for Quality Assurance—the case of Portugal Sónia Cardoso & Orlanda Tavares & Cristina Sin 2015

Susan L. Robertson & Roger Dale (2015) Towards a 'critical cultural political economy' account of the globalising of education, Globalisation, Societies and Education, 13:1, 149-170, DOI: 10.1080/14767724.2014.967502

Abrantes, Pedro (2010). "Políticas de avaliação e avaliação de políticas: o caso português no contexto ibero-americano", *Revista Iberoamericana de Educación*, 53, pp. 25-42.

Abrantes, Pedro, Susana da Cruz Martins e Telma Caixeirinho (2013), "Sucesso, gestão e avaliação. Um novo capítulo nas políticas educativas em Portugal?", in Luísa Veloso (org.), *Escolas e Avaliação Externa: Um Enfoque nas Estruturas Organizacionais*, Lisboa, Editora Mundos Sociais, pp. 27-46. ISBN: 978-989-8536-25-9

Afonso, A. J. (2001). Políticas contemporâneas e avaliação educacional. In Lima, L & Afonso, A. J. (eds.), *Reformas da Educação Pública: Democratização, Modernização, Neoliberalismo*, Porto, Afrontamento, 111-127.

Feitoo, Rafael (2015), National report Spain - Educational Challenges in Southern Europe. Equity and efficiency in a time of crisis, [Universidad Complutense de Madrid](#).

Alvesson, Mats; Bridgman, Todd; Willmott, Hugh (Ed.) (2009) The Oxford Handbook of Critical Management Studies, [Oxford Handbooks in Business and Management](#).

[Amândio, Sofia \(2014\)](#). *Jovens atores da gestão: Origens de classe, percursos profissionais e competências*, [Tese de Doutoramento em Sociologia, ISCTE-IUL, Lisboa](#).

Archer, M. (1979). *Social origins of educational systems*. Londres: Sage.

Ball, S. (1998). Big policies/small world: an introduction to international perspectives in education policy. *Comparative Education*, 34 (2), pp. 119-130.

- Bensimon, E. 1995. Total quality management in the academy: A rebellious reading. *Harvard Educational Review* 65 (4): 593-611.
- Birnbaum, Robert. 2000. *Management fads in higher education: Where they come from, what they do, why they fail*. New York: Jossey-Bass.
- Carnoy, M., & Rothen, D. (2002). What does globalisation mean for educational change? *Comparative Education Review*, 46(1).
- Coelho, Inês, Cláudia Sarrico e Maria João Rosa (2008). "Avaliação de escolas em Portugal: Que futuro?", *Revista Portuguesa e Brasileira de Gestão*, 7 (2), pp. 56-67.
- Colombo Maddalena (2015)(coordinator), National report Italy - Educational Challenges in Southern Europe. Equity and efficiency in a time of crisis. , Università Cattolica del Sacro cuore, Milan (Italy).
- European Comission (2015), Organisation of Single Structure Education, Eurydice, https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Portugal:Organisation_of_Single_Structure_Education
- European Comission (2015), Assessment in Single Structure Education, Eurydice, https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Portugal:Assessment_in_Single_Structure_Education
- IGEC: Inspeção Geral da Ciência e da Educação (2015), Avaliação Externa das Escolas, <http://www.ige.min-edu.pt/>
- Deming, W. E. (1986). *Out of the crisis*. Cambridge, MA: MIT Press. 1993. *The new economics for industry, government and education*. Cambridge, MA: MIT, Center for Advanced Engineering Study.
- EACEA (2013). *Key data on teachers and school leaders in Europe. 2013 Edition*. Brussels: EACEA.
- EACEA (2015). *Assuring quality in education: Policies and Approaches to School Evaluation in Europe*. Brussels: EACEA.
- Edward Sallis (1993/2002) *Total Quality Management in Education*, New York, Routledge.
- Enguita, M. (2001, 2007). *Educação e transformação social*. Mangualde: Edições Pedagogo.
- Ferreira, Ana Sousa (2014), Avaliações internacionais e desempenho dos alunos portugueses, Estudos internacionais: desempenhos contextualizados, CNE, <http://www.projavi.mec.pt/>

- Formosinho, João (2014), *Autonomia e gestão das escolas*, in Rodrigues, Maria de Lurdes (org.), *40 Anos de Políticas de Educação em Portugal. A Construção do Sistema Democrático de Ensino - Vol II*, Almedina, Coimbra
- ISO International Organization for Standardization (2012), *Quality Management Principles*, http://www.iso.org/iso/qmp_2012.pdf
- ISO International Organization for Standardization (2012), *Quality Management Principles, ISO 9001 Quality Management Systems*, http://www.iso.org/iso/home/standards/management-standards/iso_9000.htm
- James W. Dean, Jr. and David E. Bowen Management 'Theory and Total Quality: Improving Research and Practice through Theory Development'. *The Academy of Management Review*, Vol. 19, No. 3, Special Issue: "Total Quality" (Jul., 1994), pp. 392-418 Published by: Academy of Management Stable URL: <http://www.jstor.org/stable/258933> Accessed: 05-03-2015.
- Kantzara, Vasiliki (2015), *National Report Greece, Educational Challenges in Southern Europe. Equity and efficiency in a time of crisis*. Panteion University, Greece
- Langstrand, Jostein et al (2014). *Practice what you preach: quality of education in education on quality*, *Total Quality Management & Business Excellence*,: <http://dx.doi.org/10.1080/>
- Lemos, Valter (2014), *A Influência da OCDE nas Políticas Públicas de Educação em Portugal*, Almedina, Coimbra
- Lemos, Valter (2014) *A OCDE e as Políticas de Educação em Portugal*, in Rodrigues, Maria de Lurdes (org.), *40 Anos de Políticas de Educação em Portugal. A construção do sistema democrático de ensino - Vol I*, Almedina, Coimbra
- Lemos, Valter (2014), interview conducted by João Sebastião, Ana Rita Capucha and Raquel Matias in the scope of the ECSE project, December 2014
- Martins, Susana da Cruz (2012). *Escolas e Estudantes da Europa: Estruturas, Recursos e Políticas de Educação*, Lisboa, Editora Mundos Sociais.
- Mendes, Hugo (2014), *Portugal no contexto internacional*, in Rodrigues, Maria de Lurdes (org.), *40 Anos de Políticas de Educação em Portugal. A Construção do Sistema Democrático de Ensino - Vol II*, Almedina, Coimbra
- Miranda, Alvaro de (2003) *The Triple Helix in Global Historical Perspective Science, Total Quality Management and Inequality. Technology, & Human Values*, Vol. 28, No. 1, pp. 34-51.

- Petit, A. (1982). *Production de l'école, production de la société*. Genebra: Droz.
- Popkewitz, T. (1991). *Sociología política de las reformas educativas: el poder/saber en la enseñanza, la formación del profesorado y la investigación*. Madrid: Morata.
- Phillip Brown & Hugh Lauder (2006) Globalisation, knowledge and the myth of the magnet economy, *Globalisation, Societies and Education*, 4:1, 25-57.
- Ponte, João Pedro (2013), *Avaliações internacionais e desempenho dos alunos portugueses*, Seminários e Colóquios 2013, Direção: Ana Maria Bettencourt (Presidente do Conselho Nacional de Educação), Coordenação: Manuel Miguéns (Secretário-Geral do Conselho Nacional de Educação), CNE.
- Robert Cécile (2012) Expert groups in the building of European public policy, *Globalisation, Societies and Education*, 10:4, 425-438.
- [Rodrigues, Maria de Lurdes, João Sebastião, João Trocado da Mata, Luís Capucha, Luísa Araújo, Mariana Vieira da Silva e Valter Lemos \(2014\), "A construção do sistema democrático de ensino", in Rodrigues, Maria de Lurdes \(org.\), 40 Anos de Políticas de Educação em Portugal - Volume I - A construção do sistema democrático de ensino, Lisboa, Almedina, pp. 35-88. \(ISBN 9789724056494\)](#)
- Sarrico, Cláudia (2014), *Avaliação de Escolas em Portugal*, in Rodrigues, Maria de Lurdes (org.), *40 Anos de Políticas de Educação em Portugal. A Construção do Sistema Democrático de Ensino - Vol II*, Almedina, Coimbra
- Serrão, Anabela (2014), *A Avaliação e a Definição de Políticas Educativas*, in Rodrigues, Maria de Lurdes (org.), *40 Anos de Políticas de Educação em Portugal. A construção do sistema democrático de ensino - Vol I*, Almedina, Coimbra
- Stephan Gerhard Huber & Maren Hiltmann, *Competence Profile School Management (CPSM) – an inventory for the self-assessment of school leadership Educ Asse Eval Acc (2011) 23: 65–88 DOI 10.1007/s11092-010-9111-1*
- Sallis, E. (2005). *Total Quality Management in Education*. 3rd edition. London: Kogan Page.
- Sebastião, João (2009), *Democratização do Ensino, Desigualdades Sociais e Trajectórias Escolares*, Fundação Calouste Gulbenkian, Fundação para a Ciência e a Tecnologia, 300
- Torres Leonor Lima (2010), *Cultura, gerencialismo e democracia na escola pública*, Dossiê Temático, Escola Pública Edições UESB.
- Teodoro, A. (org.) (2008). *Tempos e andamentos nas políticas de educação*. Brasília: Liber.

Unterberger, Robert M (July 1991). 'Quality is the key to global competitiveness: IBM's experience', in William J Petak (ed) *Quality and Higher Education in the 21st Century, Proceeding of the Second Annual Symposium, Role of Academia in National Competitiveness and Total Quality Management*, University of Southern California, Los Angeles.

Veloso, Luísa, Pedro Abrantes & Daniela Craveiro (2011), *A Avaliação Externa de Escolas como Processo Social*, *Educação, Sociedade & Culturas*, nº 33, pp.69-88

Wagemaker, Hans (2013), *Avaliações internacionais e desempenho dos alunos portugueses*, Seminários e Colóquios 2013, Direção: Ana Maria Bettencourt (Presidente do Conselho Nacional de Educação), Coordenação: Manuel Miguéns (Secretário-Geral do Conselho Nacional de Educação) CNE.

References (Phase 2)

Eric A. Hanushek Ludger Wößmann (2007), *Education Quality and Economic Growth*, Washington DC, The World Bank.

Pedro Abrantes, 2010, Políticas de avaliação e avaliação das políticas: o caso português no contexto ibero-americano. *Revista Iberoamericana de Educación*, 53 (2010), pp. 25-42 (ISSN: 1022-6508)

Possebon, C. M and Velda, N. Z., 2013, Os desafios da gestão democrática diante da diversidade das políticas públicas presentes no cotidiano escolar, *Revista de Gestão e Avaliação Educativa*, Santa Maria – Brasil, 27-34.

Murillo, F. Javier y Hidalgo, Nina, 2015, Dime Como Evalúas y te diré qué sociedad contruyes, *Revista Iberoamericana de Evaluación Educativa*, 8(1), 5-9.

GRIFFITHS, Daniel. *Teoria da administração escolar*. São Paulo: Companhia Nacional, 1974.

JALALI, Marta. *A teoria organizacional de Greenfield: uma alternativa para a administração educacional*. Aracajú, UFSE, 1995. Dissertação (mestrado em Educação). Faculdade de Educação, Universidade Federal de Sergipe.

Lawler, Edward E., (1986). High-Involvement Management. Participative Strategies for Improving Organizational Performance. San Francisco, Jossey-Bass Inc.

Jesse B. Sears (1950) publishes The nature of the administrative process

Paulo Gomes Lima, 2013, Gestão escolar: um olhar sobre o seu referencial teórico - School management: a look at his theoretical reference, Revista de Gestão e Avaliação Educacional, v. 2, n. 3, Brasil.

Pak Tee Ng, 2015, What is quality education? How can it be achieved? The perspectives of school middle leaders in Singapore, Educational Assessment, Evaluation and Accountability, pp 1-16

Thomas D. Cook , 2007, School Based Management: A Concept of Modest Entity with Modest Results, Journal of Personnel Evaluation in Education, Volume 20, Issue 3, pp 129-145, First online: 10 January 2008 10.1007/s11092-007-9049-0

Comer, J. P. (1988). Educating poor minority children. Scientific American, 259(5), 42–48.

Mohrman, Susan Albers, Ed.; And Others, 1994, School-Based Management: Organizing for High Performance. ISBN-0-7879-0035-4. See also Allan Odden, Rodney T. Ogawa and Paula A. White, Priscilla Wohlstetter and Roxane Smyer, Susan Moore Johnson and Kathrine C. Boles, David D. Marsh, Patricia Wohlstetter.

Pak Tee Ng, 2015, What is quality education? How can it be achieved? The perspectives of school middle leaders in Singapore, Educational Assessment, Evaluation and Accountability, pp 1-16

Timmermands A. C., Wolf, I. F., Bosker R. J, Doolaard S, (2015), Risk-based educational accountability in Dutch primary education, Educational Assessment, Evaluation and Accountability, pp. 1-24.

Rinehart, G. 1993, Quality education: applying the philosophy of the Dr. W. Edwards Deming to transform the educational system. Wisconsin: ASQC Quality Press.

Schmoker, M. & Wilson, R. B. (1993). Transforming schools through total quality education. The Phi Delta Kappan, 74(5), 389-395.

Ng 2003, The Singapore school and the excellence model. Education Research for Policy and Practice, 2(1), 27-39.

Srabec 2000, Q., Jr (2000). Viewpoint: a quality education is not customer driven. Journal of Education for Business, 75(5), 298-300

UNESCO 2005, Education for all (EFA) Global Monitoring Report 2005: the quality imperative. Paris: UNESCO.

Barrett, A. M., Chawla-Duggan, R., Lowe, J., & Ukpo, E. (2006), The concept of quality in education: review of the 'international' literature on the concept of quality in education working paper no. 3. Bristol: EduQual.

Barrett, A. M. & Tikly, L. 2001, Social justice, capabilities and the quality of education in low countries. *International Journal of Education Development*, 31(1), 3-14.

Klees, S. J. (2002). World bank education policy: new rethoric, old ideology. *International Journal of Educational Development*, 22(5), 451-474.

Adams, 1993, Defining educational quality. Improving educational quality project, publication no 1: biennial report. Arlington: Institute for International Research.

9. Project documents

Education in Europe – indicators and trends. Crisis as a challenge and an opportunity to study Southern Europe. – working-paper

Index

INTRODUCTION	413
1 –EDUCATION FUNDING	414
2- LEARNING ENVIRONMENT, HUMAN RESOURCES AND ORGANIZATION (TALVEZ OUTRO TÍTULO!)	420
3- PARTICIPATION.....	425
Early childhood Education	426
Distribution of Upper secondary Students between General and Vocational programmes.....	426
Tertiary Education	427
Life Long Learning	429
Early School Leaving	430
5- EDUCATION ATTAINMENT AND SUCCESS	431
ESL Target	431
Completion rates/ Graduates	432
Upper Secondary.....	433
VET Graduates (Upper Secondary).....	435
Tertiary.....	435
Employment Rates.....	437
PISA Results	439
6- CONCLUSION - WHERE’S SOUTHERN EUROPE?	441
BIBLIOGRAPHIC REFERENCES.....	ERRO! MARCADOR NÃO DEFINIDO.

Figures /Tables

Figure 1 Public Expenditure on Education, as % of GNP – EU 15.....	416
Figure 2 Annual Expenditure, per Student, €PPS.....	416

Figure 3: Proportion of pupils and students from pre-primary to tertiary education in total population, 2000 and 2009.	425
Figure 4 Participants in early education (aged between 4-years-old and the starting age of compulsory education) - as % of inhabitants of the corresponding age group.....	426
Figure 5 Proportion of students at Upper Secondary Education by orientation. Source: OECD	427
Figure 6 Students entry in Tertiary Education evolution, 1998 -2011. Source: Eurostat.	428
Figure 7 Percentage of participation in education and training in adult population aged 25-64 at 2012 Source: Eurostat.....	430
Figure 8:% of the population aged 18-24 with at most lower secondary education and not in further education or training. Source: Eurostat.....	431
Figure 9 Percentage of upper secondary graduates under age 25, 2011. Source: OECD – Education at Glance 2012.	434
Figure 10 Tertiary Attainment %, age group 30-34. 2012.....	436
Figure 11 Employment rates by highest level of education attained, % of age group 20-64...	438
Figure 12 PISA results, reading general scores differences, 2000 -2012	439
Figure 13 PISA results, Math general scores differences, 2000-2012.....	440
Figure 14 PISA results, Science general scores differences, 2000-2012	440
Table 1 Annual Expenditure per student in € PPS (2010)	418
Table 2 Proportion of Educational Expenditure from Public and Private Sources (all levels of education)	419
Table 3: Total of students, all ISCED. Source: Eurostat.	421
Table 4 Student/teacher ratio, ISCED 1; Source: Eurostat.....	423
Table 5 Student/teacher ratio, ISCED 2; Source: Eurostat.....	423
Table 6.....	424
Table 7 Numbers of students enrolled at tertiary education, Eurostat.....	428
Table 8 Participation in education and training in adult population, 25-64, %. Source Eurostat, LLL Survey.....	429
Table 9 2020 Targets on ESL.....	432
Table 10 Proportion of Population aged 25-64 years, having completed at least upper secondary education. Source Eurostat.	433
Table 11 Proportion of Population aged 20-24 years, having completed at least upper secondary education. Source Cedefop.	433
Table 12 Number of Graduates of vocational upper secondary education (ISCED level 3). Source: Cedefop.	435
Table 13 Tertiary Attainment, % aged group 30-34. Source: Eurostat, 2020 Agenda.	435

Introduction

One of the biggest challenges for European Countries in what concerns education and this crisis context, is to guaranty a growing path and the development of countries' educational performances, with less available money towards educational policies. "Doing more with less"

as one of last reports from European Commission, “Education and Training - Monitor 2013”, resumes.

This means, maintain quality and effectiveness of the educational systems without prejudice their efficiency but, furthermore, to guaranty that the education and training outcomes, can be quickly adapted to the social and economic changings, and provide answers to the persistent youth unemployment rate (in 2011 23,2%, EU27 average), as well, other severe consequences resulted from the crisis. Moreover, Europe is seeking ways to reduce the deficit and the impacts of public debt, without engage sustainable growth and competitiveness between member states and, on other hand, between Europe and the rest of the world. A strong Europe with economic competitiveness, modern societies, and knowledge at its core, are still on the main line of EU political discourse, as a legacy from Lisbon Agenda 2001.

Challenges can also be reflected on the European current political action, which defends that member’s states have to implement the right amount of capital, on the right educational sector and yet, reveal good performances at all concerning educational indicators.

These challenges assume a particular emphasis, if we consider the crisis as one opportunity to analyse the Southern European trends. First, by assuming that for the last years, these countries were in a path of convergence, achieving good results in several educational indicators; secondly, by analysing the main crisis’s consequences and impacts on their educational and training systems, or in their political choices, towards education and training systems. If education is to be considered the main key to reduce these impacts, how to guaranty a course of development among these countries, if they are facing severe measures and cuts? How to guaranty that Southern Europe will “overcome” this crisis, entering again on a growing path, if we are already detecting negative impacts in educational systems and their results, or, in a more generic way, if less capital are being allocated in education?

Before enter further considerations, it is important to give a more generic vision of some educational indicators in European context.

1 –Education Funding

The recent report from Eurydice, “Funding of Education in Europe”, demonstrates that the financial crisis has having impacts on countries education budgets. Particularly to countries with severe austerity measures and therefore, with restrictions on their public policies. Can this allow us to consider a clear disinvestment on education in some European Countries? No data yet

provides this kind of analysis, but some numbers are confirming that less money are being allocated on education, and that this fact is being observed in several countries. Nevertheless, Southern Europe is among those most affected countries, both on budget cuts and austerity measures.

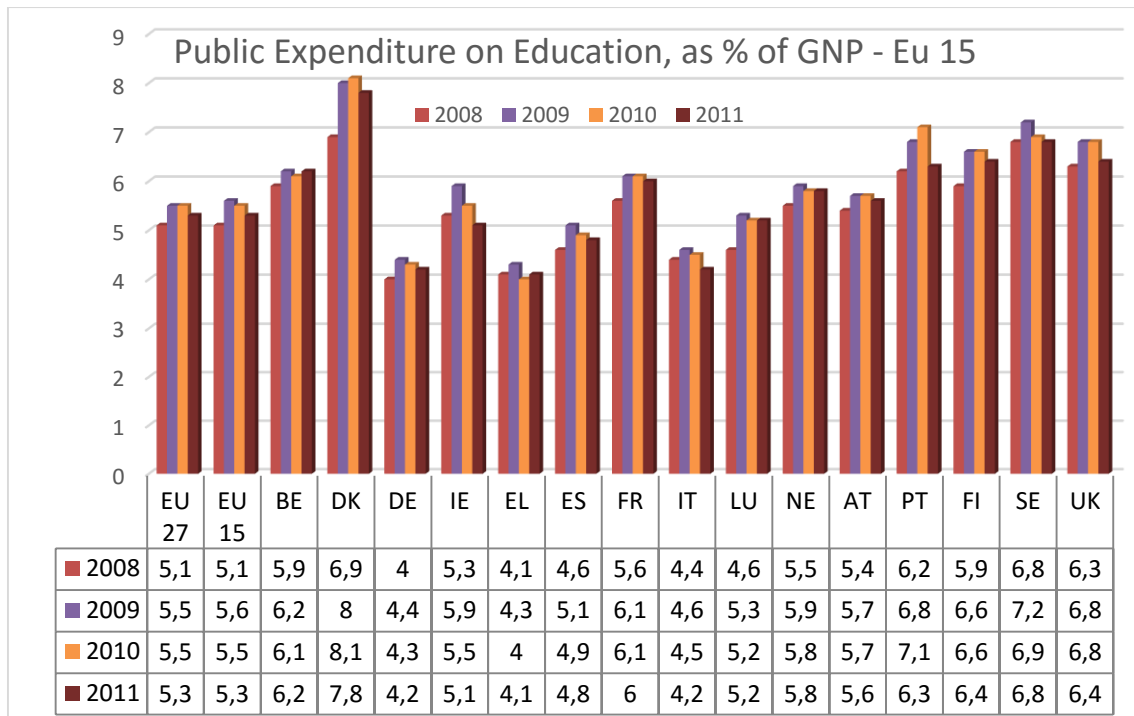
Here are some findings from that report:

- Financial crisis on education budgets are most seen in - Ireland; Greece; Spain; France; Cyprus; Lithuania, Poland, Portugal, Romania, Slovenia, Slovakia, UK and Iceland;
- Between 2011 and 2012 cuts in education budget were observed at least in 20 countries – with more of 5% - Greece, Italy, Cyprus, Latvia, Lithuania, Hungary, Romania, the UK, Croatia; from 1 to 5 % - French community of Belgium; Bulgaria, Czech-Republic, Estonia, Ireland, Spain, France, Poland, Slovenia, Slovakia, UK ;
- These budgetary restrictions also represents human resources reduction and reorganization: less teachers following students/pupils lost; salary cuts.
- Reduction and closure of educational institutions, particularly on Denmark, Italy, Latvia, Poland and Portugal.

With figure 1 we can lined-up two tendencies: even tough crisis strikes on 2008, these 15 countries increase on their education expenditure between that year and 2009. Considerably Denmark, Ireland, Spain, France, Luxembourg, Portugal and Finland. Until 2009 one positive tendency associated to more public investment on education was identified in Europe, whereas Southern countries were clearly on this European trend. After 2009 this tendency swap in all countries (except Belgium) and we observe lowest numbers for Portugal (decreasing almost one percentage point between 2010 and 2011), Ireland, UK, and Italy. At 2011, Spain showed a slightly decrease when compared with earliest years, as Greece joins Belgium as one country with slightly increase on the expenditure.

Portugal was one of the countries that revealed a real improvement if we considered the evolution on the expenditure between early 2008 and 2011, however, the decrease was evident and numbers are indicating a probability of lowest values for years to come. Among the reasons to this fact, is the extinction of the Portuguese national program for coping on adult's education and lifelong learning, "New Opportunities".

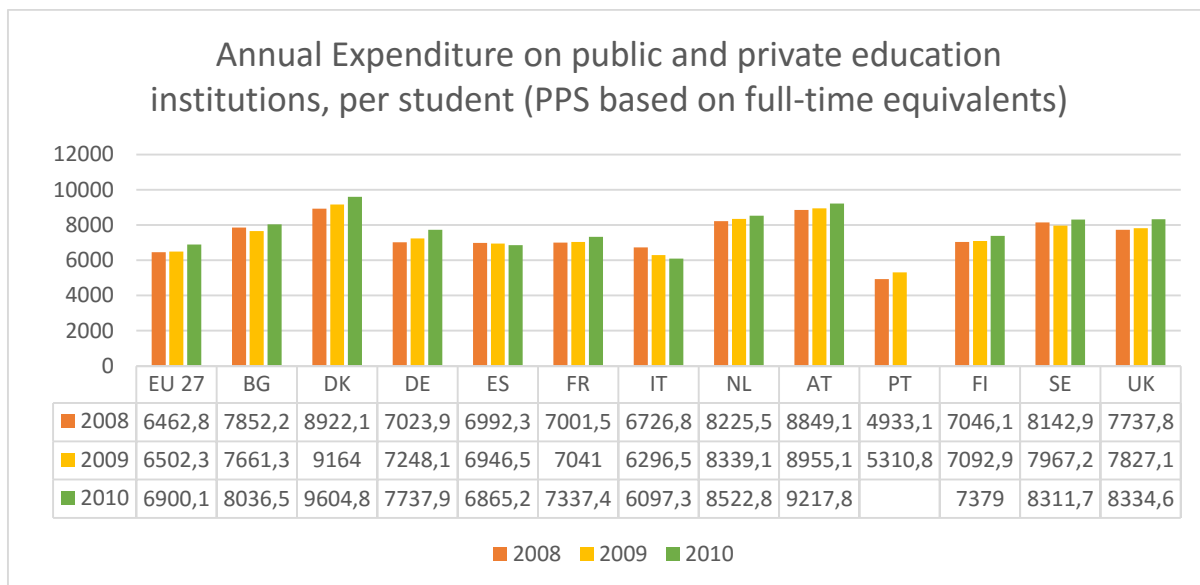
Figure 7 Public Expenditure on Education, as % of GNP – EU 15.



Source: Eurostat.

The European spending average per students is 6,900€, being much more extensive on Tertiary level (9,600€) when compared with Primary (5,100€) and Secondary (6,100€) levels. (EU report 2012) The next graphic gives a general idea (no data available for Greece, Luxembourg and Ireland):

Figure 8 Annual Expenditure, per Student, €PPS



Source: Eurostat

Attempting crisis impacts on government's education expenditures, becomes more difficult if we considered the amount of the spending per student, once last available data is referent to 2010. However these data points to a predictable scenario, where southern countries are perhaps on a course of lost, as it is confirmed with the stagnation in Spain and the decrease in Italy. No data available for 2010 Portuguese expenditure, or data concerning Greece. All other countries follow European's trend presenting an increase on their expenditures per student. Despite this fact, 2011 and 2012 cuts in education spending, are likely to be observed on expenditure per student, especially on tertiary level (EU report) which remains a sector with an upward trend. In fact, by extending the analyses to all 27 members other tendencies can be demonstrate.

Analysing the variable "students expenditure" crossed with "education level" allows further considerations. European last report on education and training (E&T Monitor 2013, see Table 1), describes one decreased status in several state members, alternating between decrease within all levels of education – Romania, Hungary, Italy, Spain; or, decrease on one/two particular levels – Belgium, Czech Republic, Cyprus, Netherlands, Austria Sweden (Tertiary level), Cyprus, Lithuania, Luxembourg, Austria,(Secondary level), Slovene (primary level).

All other countries registered increases, or stabilized, considering earliest years. Portugal is in this group, yet the recent evidences are showing a decrease on education funding in general terms, which might affect spending on students.

It is possible to predict worse scenarios within this crisis context as no data from 2012/2013 are available. Cuts and financial reforms have been a current reality in European member states, nevertheless, it is argued that countries are being encouraged to adopt budget priorities toward their policy-making and educative objectives, and therefore, gains are also to be expected in some countries (especially on Belgium, Czech Republic, Denmark, Cyprus, Austria).

Still, one general idea remains: proportion of educational expenditure, per pupil, rises with the level of education.

Table 1 Annual Expenditure per student in € PPS (2010)

Country	Expenditure per student	Expenditure per Student	Expenditure per Student
	Primary	Secondary	Tertiary
EU	6,131	7,128	9,638
Belgium	6,818	8,476	11,691
Bulgaria	2,190	2,148	3,763
Czech Republic	4,136	4,464	5,881
Denmark	8,598	9,177	14,617
Germany	6,240	8,373	12,357
Estonia	4,108	5,355	5,038
Ireland	-	-	-
Greece	-	-	-
Spain	6,207	7,938	10,301
France	6,039	9,825	11,606
Croatia	3,285	3,485	5,233
Italy	6,467	6,660	7,379
Cyprus	9,260	10,849	9,933
Latvia	3,533	3,365	4,315
Lithuania	3,295	3,291	5,066
Luxembourg	15,262	13,203	-
Hungary	-	-	-
Malta	7,713	5,444	11,719
Netherlands	7,279	9,048	13,219
Austria	8,774	9,136	11,895
Poland	4,279	3,735	5,951
Portugal	4,279	6,258	7,742
Romania	1,674	1,680	2,956

Slovenia	6,971	5,670	7,296
Slovakia	4,168	3,466	5,318
Finland	6,997	6,094	12,874
Sweden	7,634	7,945	15,068
UK	7,585	7,642	12,781

Source: adapted from "Education and Training Monitor 2013", European Commission

Another important indicator, concerning the funding area, is the proportion of "private spending on education" comparing to public investment. As well, the amount of public investment toward private institutions. For example, Portuguese government is currently giving several benefits to private educational institutions as one measure considered to induce freedom on parental choice of schools and schools autonomy.

The public sector is still the mainly source of financing, with the register of the increase of private investments and mixed investments. The next table shows the numbers for 2011:

Table 2 Proportion of Educational Expenditure from Public and Private Sources (all levels of education)

	Public Funding %	Private Funding%
EU	86,2	13,8
BEL	94,3	5,7
DN	92,2	7,8
GER	85,4	14,6
IR	-	-
GRE	-	-
SP	87,1	12,9
FR	90	10
IT	91,4	8,6
LUX	-	-
NETH	83,6	16,4
AU	90,8	9,2
PT	90,5	9,5
FIN	97,4	2,6
SW	97,3	2,7
UK	69,5	30,5

Source: Key Data on Education Europe, 2012

As it is observed, public investments correspond to the largest portion in all countries. Countries like UK, Netherlands, Germany and Spain, revealed largest shares of private investments (above EU average). Although, Netherlands and Germany have the largest values of financial aid to pupils and students (Key Data on Education in Europe, 2012). Furthermore, and once that compulsory education is mostly free of charge to students (in most all European countries), the proportion of private funding is basically linked to the funding of education-oriented pre-primary schooling and tertiary education.

2- Learning environment, human resources and Organization

Budget cuts can also be reflected on human resources and their contingent reduction. In fact, at EU27 context human resources costs (including wages) represent 70% of the total annual education expenditure. Portugal and Belgium have proportions of expenditure near 85% whereas Italy and Spain remains at the EU average. (Funding of Education in Europe 2000-2012).

Some other key findings can be resumed: salary cuts among educational professionals - teacher staff salaries and allowances, were reduce or frozen in half of the countries examined by lately Eurostat report (2012 Key Indicators). For the last years, Spain, Greece, Ireland and Portugal were some of the countries forced to apply continuous cuts in public sector, which determined lowest salaries for teachers; reduction on numbers of teachers allocated to schools, and therefore, increase of the unemployment rates; increase on teaching hours, among other evidences.

At 2012, higher enrolment rates on education were observed despite the decline in the total number of young people. Nevertheless, data shows at least 3 southern countries presenting less number of enrolled students (see table 3) – affecting both enrolment rates and students-teachers ratios, (tables 4, 5, 6). On the other side, the European demographic framework explains the progressive aging of teachers in the active. These two factors combined, meaning the professional aging and the diminution of students, will change the course of education and training systems trough out Europe

Table 3: Total of students, all ISCED. Source: Eurostat.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
EU 27	110899692	110597953	111254239	112081799	107965854	107434222	107512143	107555952	108010157	108325709
EU 15						67560795	67814135	67975040	68465579	
DE	16863525	16842054	16821660	16699519	16837084	16670759	16475459	16370235	16290875	16301638
AT	1643769	1648832	1669018	1678395	1687551	1675948	1693021	1702316	1728221	1721392
BE	2733590	2774971	2732428	2792254	2821180	2829681	2844592	2860871	2884291	2907247
DK	1295854	1319553	1377411	1397896	1394834	1406558	1402521	1411190	1436855	1473470
ES	8677012	8663370	8864819	8966986	9019114	9115368	9260741	9442726	9701187	9943546
FI	1318610	1330292	1345235	1377334	1386313	1394546	1398153	1388187	1396119	1396592
FR	14247289	14350323	14401428	14939874	14948246	14890067	14834661	14805090	14875582	14925713
GR	2118898	2102755	2123181	2194230	2184995	2107099	2157590		2183041	2178295
IE	992214	1000752	1032735	1037231	1035726	1054277	1053442	1076353	1164744	1201831
IT	10795177	10889472	11023696	11063752	11126530	11152868	11165737	11165203	11221529	11207743
LU	86486	87717	85841	87589	91985	90496	91975	93120	100634	102385
NL	3595529	3583345	3613916	3644575	3672984	3746572	3778152	3792370	3829996	4211855

PT	2205016	2208991	2198954	2172853	2124260	2144991	2374720	2435665	2406098	2329440
UK	17587145	17126560	17372082	17691665	13725365	13611581	13778640	13901180	14187278	14240825

As a result from demographic impacts and crisis demands (cuts and changes on political sphere), countries are introducing regulations on establishing a maximum and, at some cases, minimum number for class sizes. Over the past decade, no significant differences were seen on official maximum number of students per class, nevertheless, countries like Portugal and Spain have raised these numbers. At European context the maximums are positioned between 25 and 35 students, as the highest numbers are found in the United Kingdom (Scotland), for primary and lower secondary education, with a maximum number of 33 and Spain, at ISCED 3, with 35 students. Portugal presents a maximum number of 28, Italy and Greece 30.

Considering the cases where the increase of class sizes comes along with the pupils/teachers ratios decrease, it will be expected a much deeper reduction on numbers of teachers under pay.

Table 4 Student/teacher ratio, ISCED 1; Source: Eurostat.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Belgium	13,1	13,1	12,9	12,8	12,6	12,6	12,6	12,5	12,4	12,4
Denmark	10,9	10,8	11,3				10,1	9,9	11,5	11,8
Germany	18,9	18,7	18,8	18,8	18,7	18,3	18,0	17,4	16,7	16,3
Ireland	19,5	18,7	18,3	17,9	19,4	17,9	17,8	15,9	15,9	15,7
Greece	12,5	12,1	11,3	11,1	10,6	10,1				
Spain	14,6	14,3	14,3	14,3	14,2	13,6	13,1	13,3	13,2	13,2
France	19,4	19,4	19,4	19,4	19,3	19,7	19,9	19,7	18,7	18,4
Italy	10,6	10,9	10,7	10,5	10,5	10,5	10,6	10,7	11,3	11,7
Luxembourg	11,6	10,8	10,7		11,3	11,2	12,1	11,6	10,1	9,9
Netherlands	17,0	16,0	15,9	15,9	15,3	15,6	15,8	15,8	15,7	20,6
Austria	14,4	14,4	15,1	14,1	13,9	13,6	12,9	12,6	12,2	12,1
Portugal	11,0	11,3	11,1	10,8	10,6	11,8	11,3	11,3	10,9	11,2
Finland	15,8	16,6	16,3	15,9	15,0	15,0	14,4	13,6	14,0	13,7
Sweden	12,5	12,3	12,1	12,2	12,1	12,3	12,2	12,1	11,7	11,3
United Kingdom	19,9	20,0	21,1	20,7	19,8	19,4	20,2	19,9	19,8	19,9

Table 5 Student/teacher ratio, ISCED 2; Source: Eurostat.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Belgium		10,6	10,6	9,4	9,4	9,2	8,1	8,1	8,1	8,1
Denmark										
Germany	15,7	15,6	15,6	15,5	15,5	15,2	15,0	15,1	14,9	14,2
Ireland	14,6	13,9								
Greece	9,3	8,7	8,2	7,9	8,0	7,7				
Spain	13,7	13,3	12,9	12,5	12,5	11,7	10,3	10,1	10,1	10,3
France	13,7	13,7	14,1	14,2	14,1	14,3	14,6	14,9	15,0	14,8
Italy	9,9	10,3	10,3	10,5	10,4	9,5	9,7	10,0	11,9	11,5
Luxembourg	9,0	9,0					9,0	18,4	24,3	22,1
Netherlands										15,3
Austria	9,8	10,0	10,4	10,6	10,4	10,3	9,9	9,6	9,3	9,1
Portugal	9,3	8,9	10,0	8,2	8,3	7,9	8,1	7,6	7,9	8,2
Finland	10,6	9,8	10,0	10,0	9,7	9,9	10,6	10,1	9,8	9,3
Sweden	12,2	12,1	11,9	12,0	11,4	11,5	11,4	11,3	11,4	11,3
United Kingdom	17,6	17,4	17,1	17,0	16,7	16,7	15,0	16,1	17,1	15,2

Table 6: Student/teacher ratio, ISCED 3; Source: Eurostat.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Belgium	9,3	9,6	9,2	9,9	10,2	10,2	10,8	10,2	10,1	10,1
Denmark	14,2	13,4								
Germany)	13,6	13,7	13,9	14,0	14,3	14,3	14,0	13,9	13,2	13,8
Ireland	14,6	13,9	14,3	15,6	14,6	13,2	12,9	12,6	14,4	14,4
Greece	9,3	8,6	8,4	8,8	8,3	7,3				
Spain	8,3	7,9	8,0	8,1	7,8	7,7	8,7	9,3	9,6	9,8
France	10,6	10,6	10,3	10,3	9,7	9,6	9,4	9,6	9,7	10,0
Italy	10,3	10,8	11,5	12,0	11,9	11,7	11,8	11,8	12,1	12,8
Luxembourg	9,0	9,0	9,0	9,0	9,0	9,0		9,2	7,6	8,9
Netherlands	15,9	15,7	15,8	16,2	15,8	15,7	15,8	16,1	16,5	35,5
Austria	10,3	10,2	11,0	11,3	11,3	11,0	10,5	10,2	10,1	9,8
Portugal	7,5	8,3	7,3		7,5	8,4	7,3	7,7	7,2	7,3
Finland	16,0	15,9	16,2	18,0	15,8	15,9	15,9	16,6	17,1	16,3
Sweden	14,1	14,1	14,0	14,0	13,8	13,6	14,7	13,2	13,1	13,0
United Kindgdom	21,6	20,3	12,6		11,4	11,2	12,4	12,3	15,2	17,3

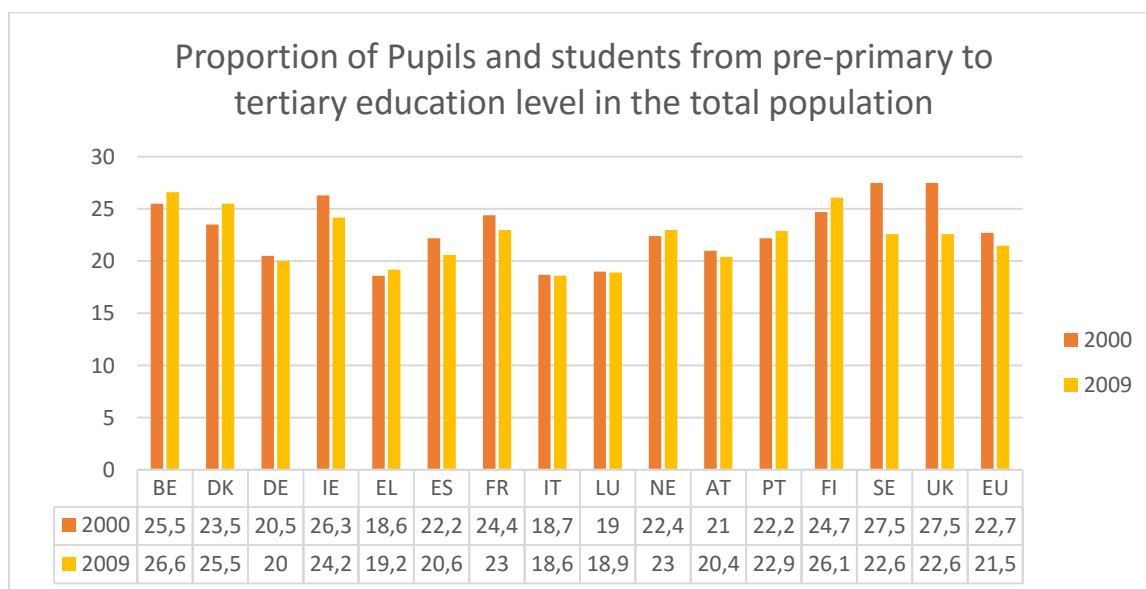
Student/ teacher ratio decreases between primary and secondary education, for the majority of the European countries. In 2009, Eurostat reports that the average in primary was 14:1 and in secondary 12:1.

Across Europe, data demonstrates the progressive decline or stagnation of these ratios over the years. Portugal is one of the countries presenting the lowest ratios. Considering primary level, at 2011, we find the lowest numbers in Luxembourg 9,9 , Portugal 11,2 , Sweden 11,3 , Italy 11,7 and Denmark 11,8 ; as for the highest, Netherlands leads with 20,6, UK 19,9 and France 18,4. For Secondary level, Belgium presents the lowest ratio 8,1 along with Portugal 8,2. The highest numbers are from Luxembourg 22,1 Netherlands and UK ,with 15,2 and 15,3 respectively. As for the upper secondary, Netherlands outstands with 35,5 and Portugal presents the lowest ratio of all of 7,3.

3- Participation

The demographic context has been affecting scholar enrolment rates. However, the proportion of pupils in formal education is not declining, once we consider also the decrease numbers of young people aged 0-29. Participation and schooling rates only tends to declines after completion of compulsory education.

Figure 9: Proportion of pupils and students from pre-primary to tertiary education in total population, 2000 and 2009.



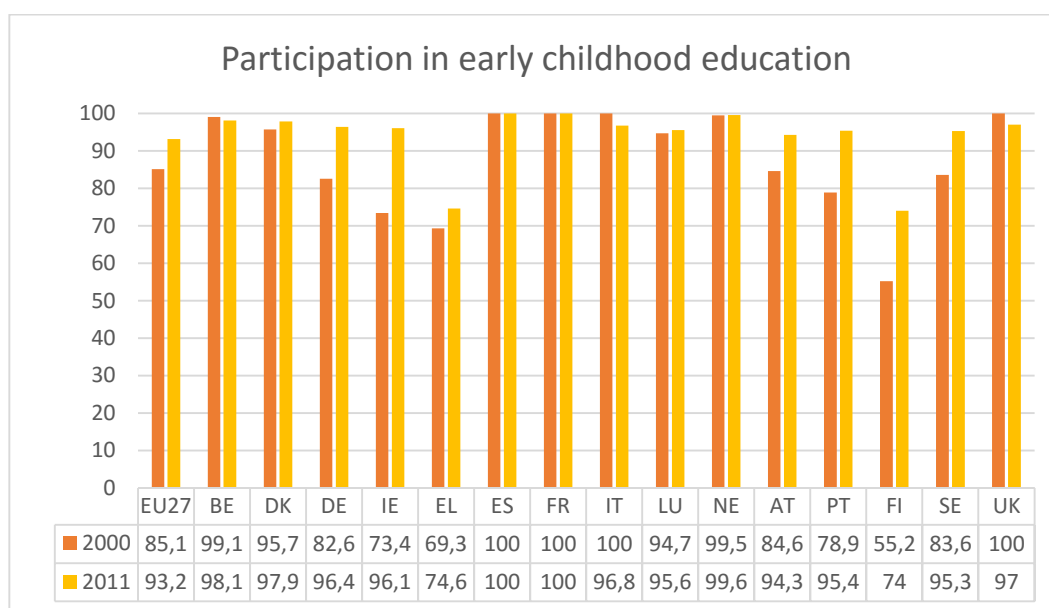
Source: Eurostat.

According to Eurostat report (2009): children were likely to enrol in formal education at an increasingly early age; almost 90% of all 17-year-old European are still in education; almost half of 15-years-olds were enrolled in lower secondary education and approximately half in upper

secondary; the participation in upper secondary increase near the 80% at the age of 17; around 15% of 18-year-olds enrolled at tertiary education, as well, 31% at the age of 19 and 36% at 20. For each age group, 4% goes to post-secondary non- tertiary education. Let us focus on the most important indicators:

Early childhood Education

Figure 10 Participants in early education (aged between 4-years-old and the starting age of compulsory education) - as % of inhabitants of the corresponding age group

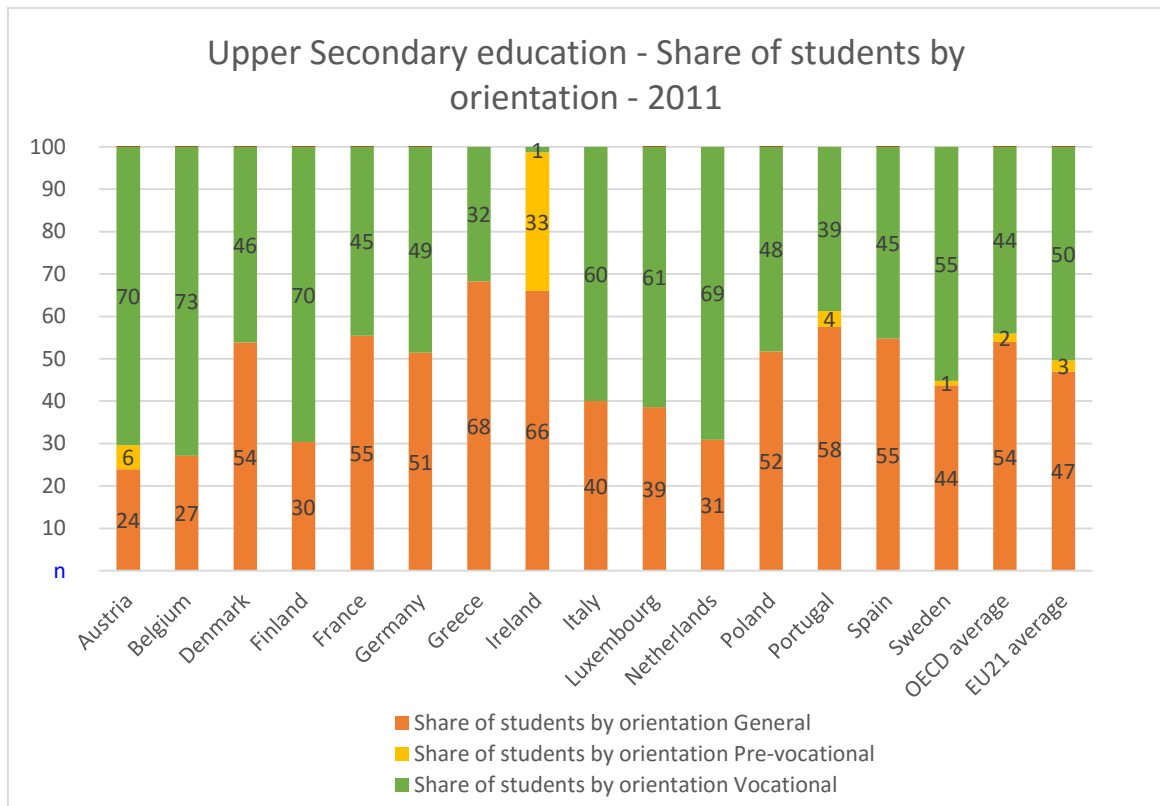


One of the highlights in 2020 Agenda, is the early childhood education. The target is to increase the EU average from 93,2 to 95% at 2020. The graphic shows that most of the countries are already on the target or even above. The exceptions remains at: Greece, Finland and Austria. Nevertheless, considering the European context, even more countries are following this evidence. As for the rest of Southern Countries, trends are positive and targets are being fulfilled. However, one note goes to Italy, UK and Belgium once these state-members are demonstrating declines.

Europe has struggling over the years for the institutionalization of early schooling in all member states, once it is well known that early entry into the formal school system, prevents the future performance in education, as well, the school dropout.

Distribution of Upper secondary Students between General and Vocational programmes

Figure 11 Proportion of students at Upper Secondary Education by orientation. Source: OECD



At European level, between the years 2000 and 2009, the share of pupils in general education rise 5,5%, reaching 50,4% in 2009. On the other hand, the proportion of vocational areas increased significantly. Both areas are currently balanced. Several incentives were given to countries over the years, in order to develop and improve their vocational training systems. Austria, Belgium, Finland, Italy, Luxembourg, Netherlands are some countries presenting at 2009 major proportions of students entering vocational pathways. Portugal and Greece are the countries with lowest shares of pupils in vocational education.

Tertiary Education

There's a strong connection between age groups and the entry to the tertiary education. An interesting fact, is the proportions of students at the theoretical entrance age who enrolled in tertiary system at southern Europe, becoming higher than on other countries such as Germany – even though, Southern Europe is in the group that has the lowest entry numbers. On the other hand, we must consider the differences of educational systems and the real average ages of transference to tertiary level, as well, the demographic contexts.

In absolute terms, tertiary enrolment has been rising in most of the European countries and Southern Europe has a positive trend. However, within a crisis context, recent evidences are showing rates of drop out in this education level. There's still no official data but several entities, especially of the media sector, presenting us everyday cases. The costs for families, augment considerably with tertiary education, and several pupils and students are deferring on payment of fees.

Yet, we must take in account Greece. This country were the only member state that doubled it tertiary participation between years 98 -2008/2011, while other countries showed signs of stagnation.

Figure 12 Students entry in Tertiary Education evolution, 1998 -2011. Source: Eurostat.

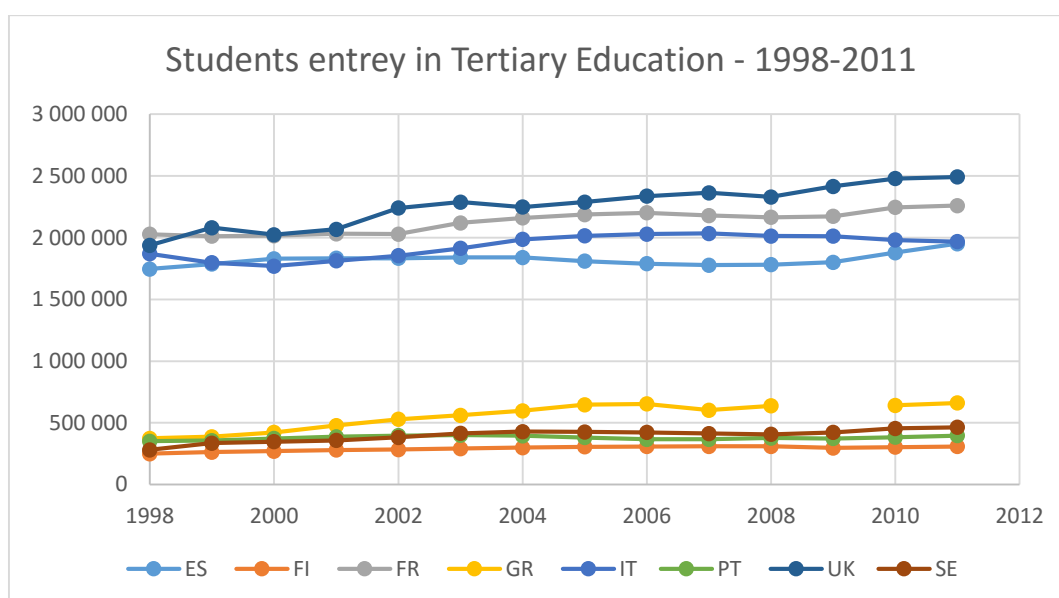


Table 7 Numbers of students enrolled at tertiary education, Eurostat

	1998	2008	2009	2010	2011
UE27	14 644 771	19 037 163	19 470 362	19 846 588	20 129 957
DE	2 097 694	2 245 138	2 438 600	2 555 559	2 763 116
AT	247 498	284 791	308 150	350 190	361 797
BE	-	401 652	425 219	445 309	462 419
DK	183 274	230 707	234 574	240 536	258 932
ES	1 746 170	1 781 019	1 800 834	1 878 973	1 950 482
FI	250 047	309 648	296 691	303 554	308 336
FR	2 027 422	2 164 538	2 172 855	2 245 097	2 259 448
EL	374 122	637 623	-	641 844	660 741

IE	142 774	178 518	182 609	194 009	196 321
IT	1 869 101	2 013 856	2 011 713	1 980 399	1 967 569
LU	1 835	-	-	5 376	6 085
NL	461 374	602 286	618 502	650 905	780 014
PT	351 784	376 917	373 002	383 627	396 268
UK	1 938 423	2 329 494	2 415 222	2 479 199	2 492 284

According to Eurostat report, in 2009 at EU level, 13% of men and 19% of women aged 18 were already on tertiary systems. These participation rates rise at the age of 20 to 30% and 42% respectively, and decline after age 24 –rates drop out around 5% per year.

Life Long Learning

Adult's participation on education and training, represents one of the most important indicators on education and quality of the systems. Lisbon Strategy at 2001, appealed to all member states for developing better systems for qualifying the adult's population, or, to intensify this qualification strategies. As well, strengthening the programmes providing actions of long life training.

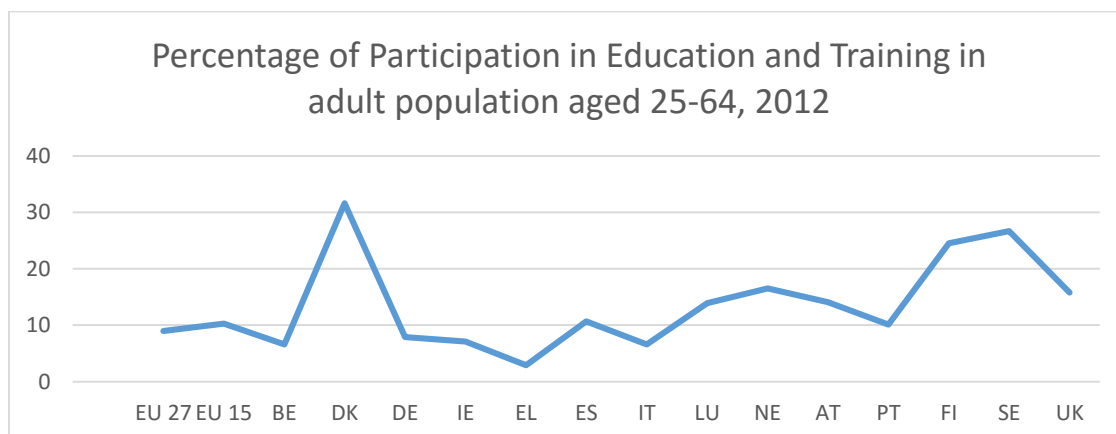
Table 8 Participation in education and training in adult population, 25-64, %. Source Eurostat, LLL Survey.

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU 27	8,5	9,8	9,5	9,3	9,1	9,2	9,2	9,1	8,9	9,0
EU 15	9,6	11,2	10,9	10,7	10,4	10,6	10,5	10,4	10,0	10,3
BE	8,5	9,5	8,3	7,5	7,2	6,8	6,8	7,2	7,1	6,6
DK	18,9	26,5	27,4	29,2	29,0	29,9	31,2	32,5	32,3	31,6
DE	6,0	7,4	7,7	7,5	7,8	7,9	7,8	7,7	7,8	7,9
IE	9,6	7,2	6,9	7,5	7,6	7,3	6,3	6,8	6,8	7,1
EL	3,9	1,8	1,9	1,9	2,1	2,9	3,3	3,0	2,4	2,9
ES	5,8	5,1	10,5	10,4	10,4	10,4	10,4	10,8	10,8	10,7
IT	4,7	6,8	5,8	6,1	6,2	6,3	6,0	6,2	5,7	6,6
LU	6,5	9,8	8,5	8,2	7,0	8,5	13,4	13,4	13,6	13,9
NE	17,4	17,3	15,9	15,6	16,6	17,0	17,0	16,6	16,7	16,5
AT	8,0	12,9	12,9	13,1	12,8	13,2	13,8	13,7	13,4	14,1
PT	3,7	4,8	4,1	3,8	3,9	4,9	6,1	5,5	11,0	10,1
FI	17,6	23,5	22,5	23,1	23,4	23,1	22,1	23,0	23,8	24,5
SE	34,2	35,8	21,4	18,4	18,6	22,2	22,2	24,4	24,9	26,7
UK	21,3	35,5	28,1	26,7	20,0	19,9	20,1	19,4	15,8	15,8

Focusing on 25-64 adults on education and training, we verify, in general, that almost countries presented a positive evolution over the years, exception on Sweden, Belgium and Ireland. As for Southern Countries, Portugal presents the greatest improvement, although at 2012 it started to show signs of decline. In fact, due to the recent government measures, the “Novas Oportunidades” programme (responsible for adults qualification) was terminated, and yet no signs of alternative or effective measures. Greece continues to present lowest percentages, as north of Europe remains on top positions.

In fact, increasing the share of the population aged 25-64 who stated receiving formal or non-formal education, is one of the 2020 targets (current average on EU at 9%, intended to be rose to 15% at 2020).

Figure 13 Percentage of participation in education and training in adult population aged 25-64 at 2012 Source: Eurostat



Early School Leaving

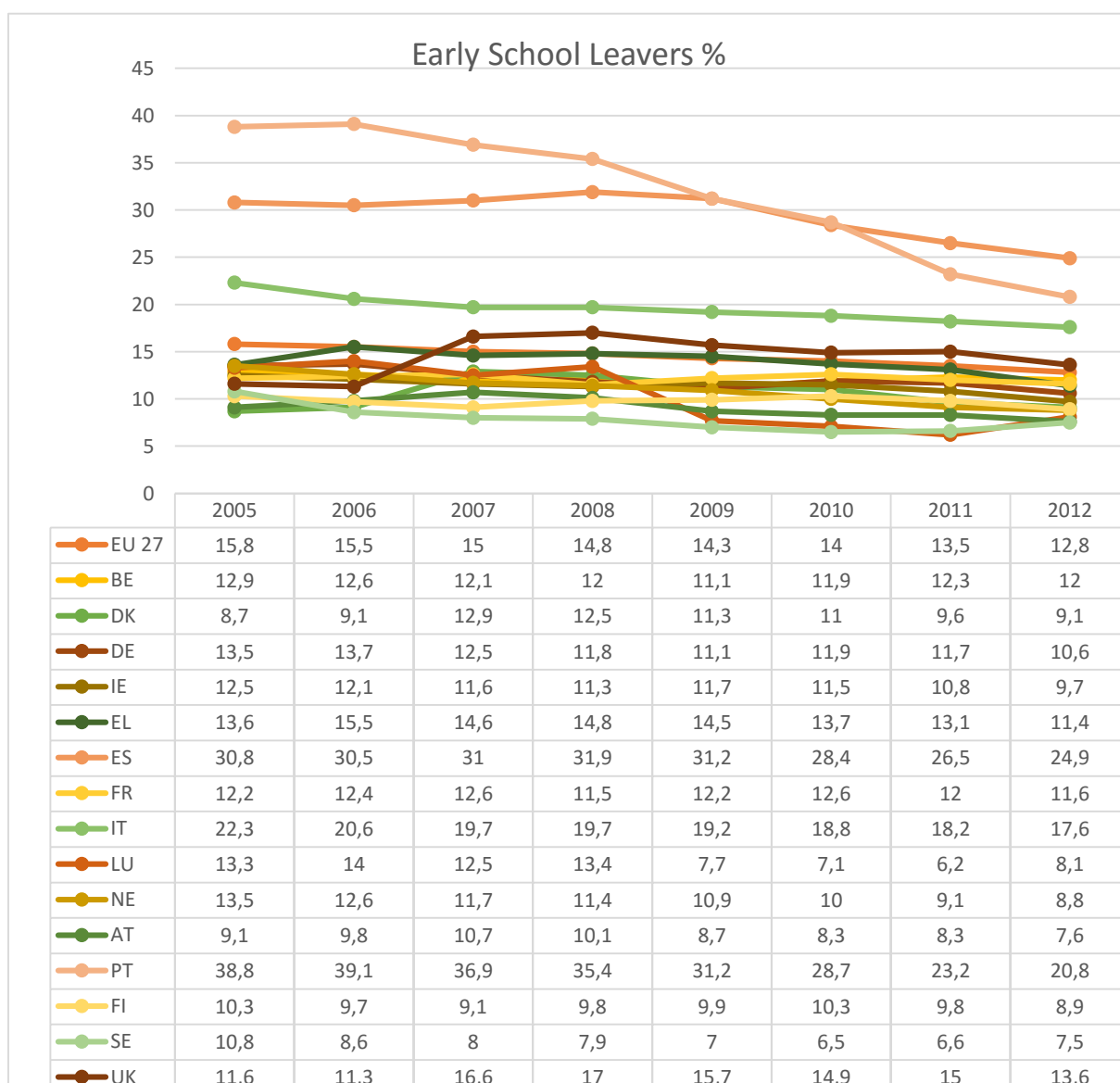
One measure that is quite associated with participation and enrolment rates, is the “early school leaving”. Countless factors can contribute to the decline of this indicator, such as: strong programmes of prevention; compulsory school; intensification of childhood early schooling rates; proper school offer towards specific groups of population (those groups that tended to be more vulnerable to dropout); programmes for school success incentive; measures towards inclusion, among others.

Since 2009, EU has decreased its early school leaving rate by 1.5 percentage points. By 2012 it presented an percentage of 12,8. This represented an annual progress of 3,7%. All European

countries in this analysis had a progressive decrease at their rates, as the result of several efforts and domestic policies. However, and despite of the efforts, there is still members with high rates. Portugal and Spain still have rates above 20%. (Figure 5)

On other hand, reports from Eurostat are referring that some countries such as Italy, Germany, and France, are facing a problem of stagnation. And in this particular case, Italy assumes the worst case due to its lowest annual progression.

Figure 14:% of the population aged 18-24 with at most lower secondary education and not in further education or training. Source: Eurostat



5- Education Attainment and Success

ESL Target

We can initiated this point with Early School Leaving (ESL) as well. This indicator is an 2020 objective and a headline target. Success of educational systems depends, among other things, on their ability to maintain young population at schools. Particularly, creating ways to guaranty more proportions of youngsters on schools after the compulsory attainment. It depends also, in their capacity to generate levels of success and social equity.

2020 Agenda determines that the share of early school leavers from education and training – meaning the share of population aged 18-24, fulfilling two conditions: the highest level of education or training attained equals ISCED 0, 1, 2 or 3c short; respondents declared not having receive any education or training in the four weeks preceding the survey,- could be, at 2020 less than 10%.

Spain and Portugal have a long way to achieved their designed targets.

Table 9 2020 Targets on ESL.

ESL	2012	TARGET 2020
EU 27	12,8	10
BE	12	9,5
DK	9,1	10
DE	10,6	10
IE	9,7	8
EL	11,4	10
ES	24,9	15
FR	11,6	9,5
IT	17,6	16
LU	8,1	10
NE	8,8	8
AT	7,6	9,5
PT	20,8	10
FI	8,9	8
SE	7,5	10
UK	13,6	-

Completion rates/ Graduates

Attainment and graduation rates measure the level of success. According to EU and recent 2020 Agenda, the target is to assure that by 2020, 82% of the employed Europeans aged 20-34 have

completed upper secondary or tertiary (1 to 3 years before the reference year of the survey and having no longer in education or training). At 2012 this rate were 75,7%.

Upper secondary completed is, in fact, one indicator of scholar success as well a way to improve market structure and labour force.

Upper Secondary

Table 10 Proportion of Population aged 25-64 years, having completed at least upper secondary education. Source Eurostat.

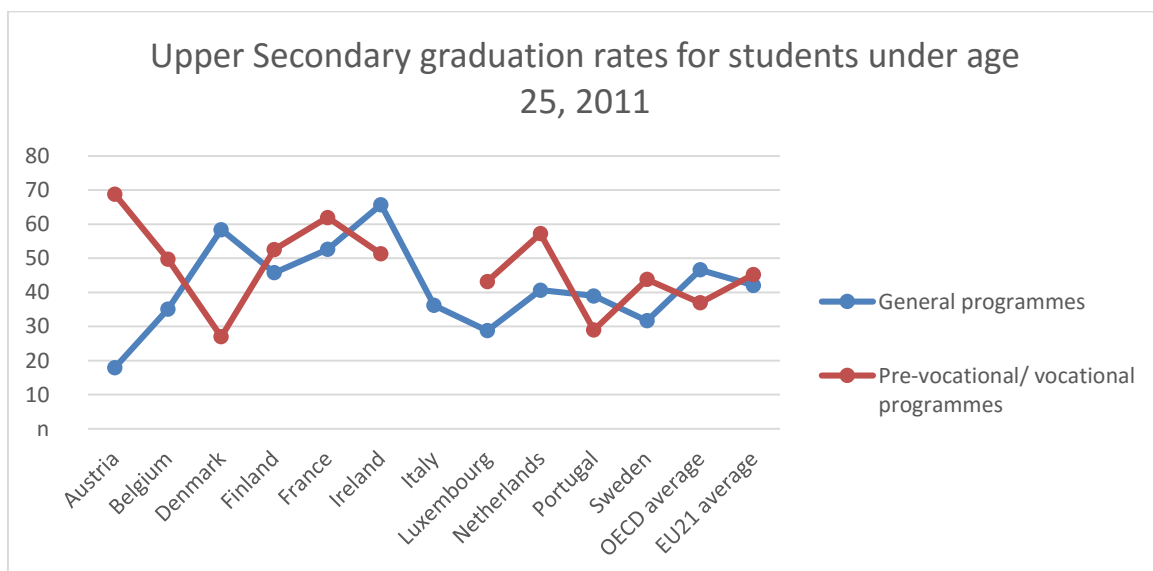
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU27	64,9	65,8	67,2	68,3	69,3	69,9	70,7	71,4	72	72,6	73,3	74,2
BE	59,5	60,8	62	64,3	66,1	66,9	68	69,6	70,6	70,5	71,3	71,6
DK	80,7	81,1	80,5	81,2	81	81,6	74,3	73,8	74,8	75,6	76,9	77,9
DE	82,5	83	83,5	83,9	83,1	83,2	84,4	85,3	85,5	85,8	86,3	86,3
IE	59,2	60,3	62,2	63	65,2	66,6	68,1	70	71,1	72,8	73,6	74,6
EL	52,1	53,9	55,7	59	60	59	59,8	61,1	61,2	62,5	64,5	65,7
ES	40,4	41,7	43,2	45	48,5	49,4	50,4	51	51,5	52,6	53,8	54,4
FR	63,2	64,1	65,2	65,9	66,7	67,3	68,5	69,6	70,2	70,8	71,6	72,5
IT	43	44,1	46,4	48,6	50,1	51,3	52,3	53,3	54,3	55,2	56	57,2
LU	59,2	61,6	59,1	63,2	65,9	65,5	65,7	67,9	77,3	77,7	77,3	78,3
NE	66,9	67,8	69,2	70,9	71,8	72,4	73,2	73,3	73,4	72,3	72,3	73,4
AT	77,5	78,3	79	80,2	80,6	80,3	80,1	81	81,9	82,5	82,5	83,1
PT	20,2	20,7	22,8	25,2	26,5	27,6	27,5	28,2	29,9	31,9	35	37,6
FI	73,8	75	76	77,6	78,8	79,6	80,5	81,1	82	83	83,7	84,8
SW	80,5	81,4	82,1	82,9	83,6	78,9	79,4	80	80,7	81,2	81,6	82,4
UK	64,6	66,3	70,2	70,7	71,8	72,7	73,4	73,4	74,6	76,1	76,4	77,9

The previous data demonstrates a generic growth on graduation rates at this level, for all countries under analyses. It's clear that southern Europe presents the lowest shares of graduates. Particularly Portugal, showing only 37,6% of the population aged between 25-64 with at least the upper secondary attained(2012).

Table 11 Proportion of Population aged 20-24 years, having completed at least upper secondary education. Source Cedefop.

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU27	76,6	76,7	77,1	77,2	77,4	77,9	78,1	78,5	78,6	79	79,5	80,2
BE	81,7	81,6	81,2	81,8	81,8	82,4	82,6	82,2	83,3	82,5	81,6	82,8
DK	78,4	78,6	76,2	76,2	77,1	77,4	69,4	68,9	69,9	68,6	70	72
DE	73,6	73,3	72,5	72,8	71,4	71,9	72,9	74,1	73,7	74,4	75,3	76,2
IE	83,9	84	85,1	85,3	85,8	85,8	86,8	87,7	86,4	86,3	86,7	87,2
EL	80,2	81,1	81,7	83	84,1	81	82,1	82,1	82,2	83,4	83,6	85,4
ES	65	63,7	62,2	61,2	61,8	61,6	61,1	60	59,9	61,2	61,7	62,8
IT	67,9	69,6	71	72,8	73,4	75,5	76,3	76,5	76,3	76,3	76,9	77,6
LU	68	69,8	72,7	72,5	71,1	69,3	70,9	72,8	76,8	73,4	73,3	71,5
NE	72,7	73,1	75	75	75,6	74,7	76,2	76,2	76,6	77,6	78,2	78,9
AT	85,1	85,3	84,2	85,8	85,9	85,8	84,1	84,5	86	85,6	85,4	86,6
PT	44,4	44,4	47,9	49,6	49	49,6	53,4	54,3	55,5	58,7	64,4	67,5
FI	86,1	85,8	85,3	84,5	83,4	84,7	86,5	86,2	85,1	84,2	85,4	86,3
SE	85,5	86,7	85,8	86	87,5	86,2	86,5	86,7	87,6	87,2	87,2	86,4
UK	76,9	77,1	78,6	77	78,1	78,8	78,1	78,2	79,3	80,4	80,1	81,8

Figure 15 Percentage of upper secondary graduates under age 25, 2011. Source: OECD –Education at Glance 2012.



Considering youngest ages, Southern Europe improves in these outputs and even gets near of countries such as Denmark and Germany. Nevertheless, maintaining a position below the European average (exception on Greece). Portugal is again the country with the lowest share.

VET Graduates (Upper Secondary)

Vocational areas are one alternative to the general education, as well, an opportunity for those who intended to dropout school. As the table below shows, in general, graduates had growth over the years, especially when considering the Upper secondary level. Nevertheless, 2011 shows some declines: Belgium, Denmark, Netherlands, Austria and Sweden. Southern Countries, one the other hand are showing highest shares of graduates, being this one positive indicator.

Table 12 Number of Graduates of vocational upper secondary education (ISCED level 3). Source: Cedefop.

	2005	2006	2007	2008	2009	2010	2011
BE	72958	71747	71039	91193	93291	94322	92311
BK	29292	29729	30317	29717	31010	31590	32103
DE	572780	596549	565770	550282	441522	456017	436651
EL	48853	42505	36268	33382	:	33339	38094
ES	167577	159139	177938	173731	185076	191644	233749
FR	:	510353	501591	511693	516663	527075	555750
IT	207162	212887	219513	222333	196992	363634	378670
LU	2495	2354	2576	2542	2527	2450	2730
NE	127878	129335	127732	139400	145322	179009	155981
AT	53105	49024	55158	55669	56235	58936	58734
PT	7851	8677	11124	14701	31070	40841	44569
FI	53239	54967	56692	57128	61213	61478	65364
SE	45069	46626	49272	52288	55832	57761	57443

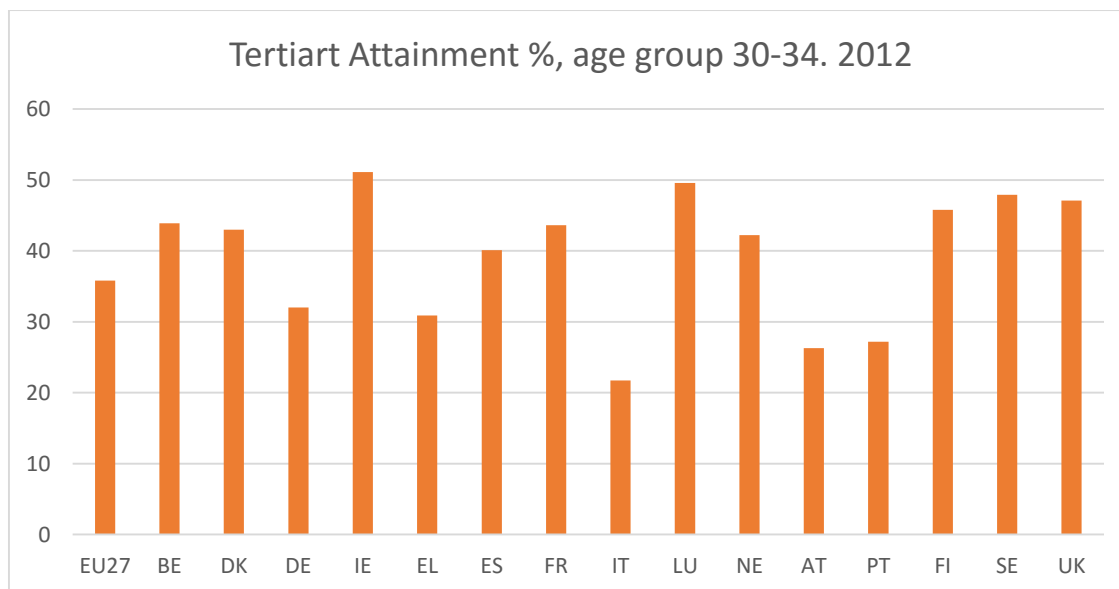
Tertiary

Increasing tertiary education is one of the targets for 2020 Agenda. Clearly this an element that brings out positive economic and social impacts (on employment rates and on continued learning amongst adults), the target is focus on tertiary attainment among adults aged 30-34. It is expected at least an average of 40% of graduates, once 2020 is reached.

Table 13 Tertiary Attainment, % aged group 30-34. Source: Eurostat, 2020 Agenda.

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	TARGET
EU27	22,4	22,8	23,5	25	26,9	28	28,9	30	31	32,2	33,5	34,6	35,8	40
BE	35,2	35,2	35,2	37,7	39,9	39,1	41,4	41,5	43	42	44,4	42,6	43,9	47
DK	32,1	32,9	34,2	38,2	41,4	43,1	43	38,1	39	40,7	41,2	41,2	43	40
DE	25,7	25,5	24,2	25,1	26,8	26,1	25,8	26,5	28	29,4	29,8	30,7	32	42
IE	27,5	30,6	32	35,1	38,6	39,2	41,3	43,3	46	48,9	50,1	49,7	51,1	60
EL	25,4	24,9	23,4	22,8	24,9	25,3	26,7	26,2	26	26,5	28,4	28,9	30,9	40
ES	29,2	31,3	33,3	34	35,9	38,6	38,1	39,5	40	39,4	40,6	40,6	40,1	44
FR	27,4	29,5	31,5	34,9	35,7	37,7	39,7	41,4	41	43,2	43,5	43,3	43,6	50
IT	11,6	12,2	13,1	13,9	15,6	17	17,7	18,6	19	19	19,8	20,3	21,7	26
LU	21,2	23,9	23,6	17,3	31,4	37,6	35,5	35,3	40	46,6	46,1	48,2	49,6	66
NE	26,5	27,2	28,6	31,7	33,6	34,9	35,8	36,4	40	40,5	41,4	41,1	42,2	40
AT	:	:	:	:	21	20,5	21,2	21,1	22	23,5	23,5	23,8	26,3	38
PT	11,3	11,7	13	14,9	16,5	17,7	18,4	19,8	22	21,1	23,5	26,1	27,2	40
FI	40,3	41,6	41,2	41,7	43,4	43,7	46,2	47,3	46	45,9	45,7	46	45,8	42
SE	31,8	26,6	28,3	31	33,9	37,6	39,5	41	42	43,9	45,3	46,8	47,9	40
UK	29	29,9	31,5	31,5	33,6	34,6	36,5	38,5	40	41,5	43	45,8	47,1	:

Figure 16 Tertiary Attainment %, age group 30-34. 2012



Several countries are above 40%, although each one has their own targets to be reached. Concerning this fact, Portugal has to almost double the percentage of graduates at this educational level. As for other southern countries, the effort it will less evident. Uk it's the only country presenting a percentage at 2012, already considered the right one towards the development of this member state as well, of all European territory.

Employment Rates

Employment rates rises within the highest level of education attained. However, and considering the high levels of unemployment, crisis is affecting the rates from those who attained highest levels of education.

Table14: Employment rate, age group 20-64 attained Upper Secondary and post-secondary non- tertiary

	2008	2009	2010	2011	2012
EU 27	71,8	70,4	69,9	69,9	69,7
BE	70,1	68,8	69,1	68,9	68,5
DK	81,7	78,8	77,8	77,7	77
DE	74,2	74,1	74,9	76,3	76,7
IE	73,5	66,7	63,1	61,6	61,7
EL	63,8	62,8	61	56,7	51,8
ES	70,4	65,4	63,7	61,9	59,7
FR	72,5	71,3	70,8	70,1	69,7
IT	69,2	67,8	67,1	66,5	65,6
LU	66,4	66,6	67,3	65,5	66,7
NE	81,3	81,4	79,4	79,2	79
AT	77,4	76,9	77	77,2	77,4
PT	69,6	70,1	70	70,2	67,3
FI	75,4	72,4	71,7	72,5	72,6
SE	82	79,3	78,9	80,4	80,4
UK	77,8	75,6	75,1	75,7	75,3

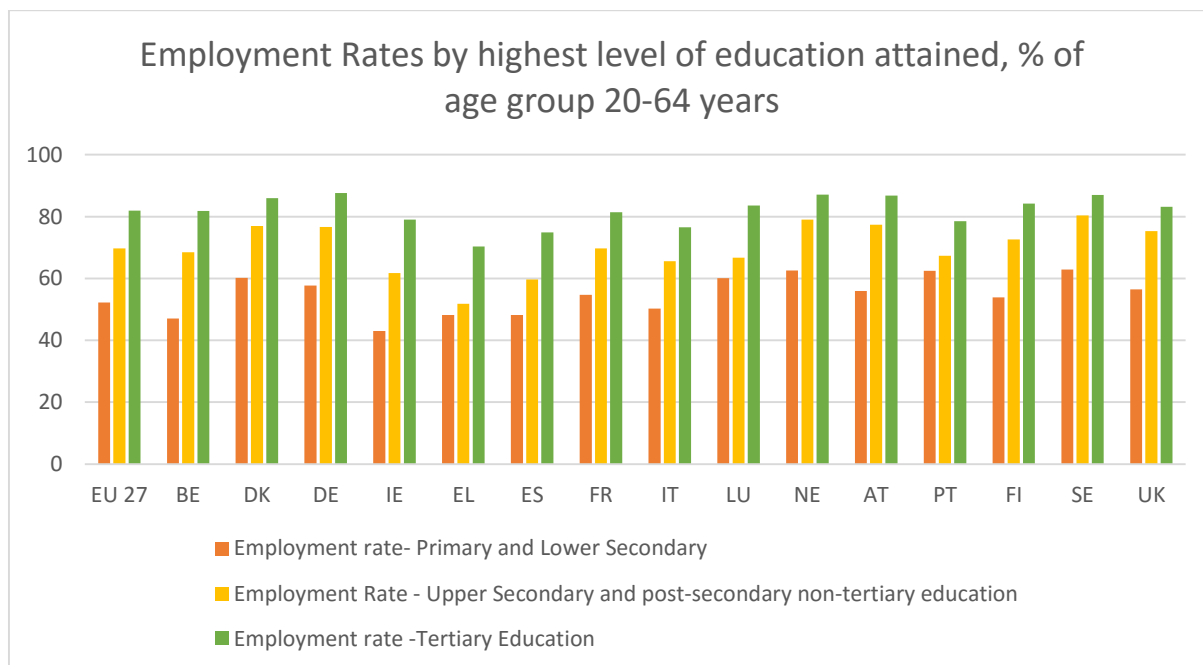
Since 2008, two scenarios can be delineated: 1 - proportions of upper secondary attained employees are declining, although signs of recovery perceived at some member states. 2- On the other hand, signs of stagnation can also be detected meaning that countries do not increase on their employment rates but neither decline. For this point, we cannot forget the demographic data showing less young people.

Considering all member-states it is clear that southern Europe is in the leading group of the lowest employed graduates. Portugal presents a curious trend: had increase on employment rates between 2008 and 2011, and reached an even lower number at 2012 (table 12 shows that the level of graduates increase at these same years).

Table 15: Employment rate, age group 20-64 Attained Tertiary Education.

	2008	2009	2010	2011	2012
EU 27	83,8	82,9	82,3	82,1	81,9
BE	83	81,9	81,9	82	81,8
DK	88,4	86,7	85,4	85,5	86
DE	85,7	86,3	86,7	87,6	87,6
IE	84,5	80,6	79,4	79,3	79
EL	82,1	81,6	78,9	74,1	70,3
ES	81,7	79	77,6	76,6	74,9
FR	81,4	80,7	80,8	81	81,4
IT	78,5	77	76,4	77	76,6
LU	83,6	83,8	83,8	83,7	83,6
NE	88	87,7	86,6	86,8	87,1
AT	86,1	86,1	85,1	86	86,8
PT	84,7	84,3	82,8	80,9	78,5
FI	85,6	84,4	84	84,3	84,2
SE	87,7	86,6	86,3	86,9	87
UK	85,3	84,3	84,1	82,7	83,2

Figure 17 Employment rates by highest level of education attained, % of age group 20-64



The decline seems to be less obvious when considering the employment rates among tertiary graduates. As the graphic shows, the employment rates increases with the highest level of

education. Thus it can be argue that education is still the most effective way to enter market and to improve labour force competences, as well as to maintain a qualify market structure. Southern Europe remains below the European average, showing a path of decline. In order to maintain the convergence process these tendencies have to be reversed.

PISA Results

Latest PISA results, as well as a longitudinal analysis, provides evidences not only on the success, but on the effort taken by some countries in order to improve their performances.

Figure 18 PISA results, reading general scores differences, 2000 -2012

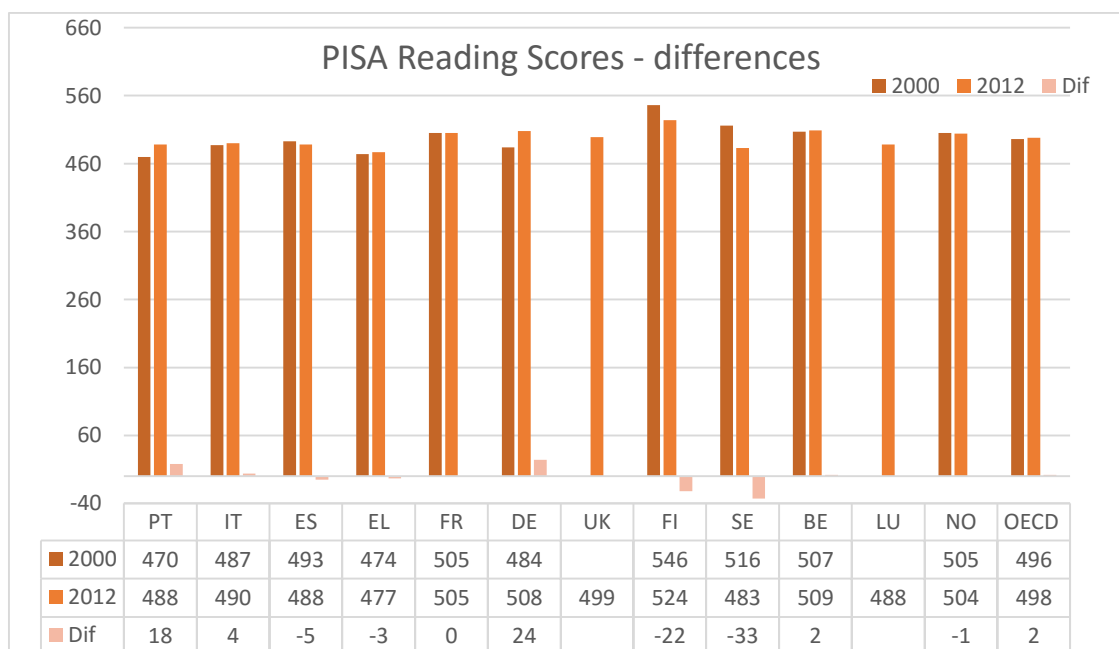


Figure 19 PISA results, Math general scores differences, 2000-2012

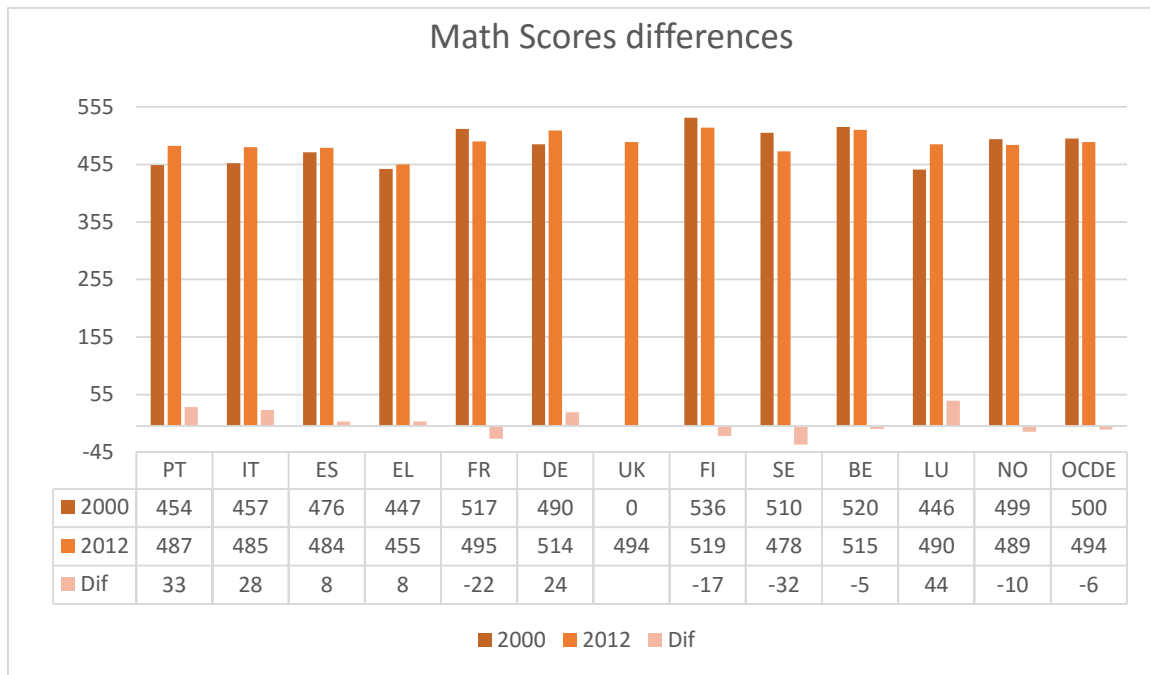
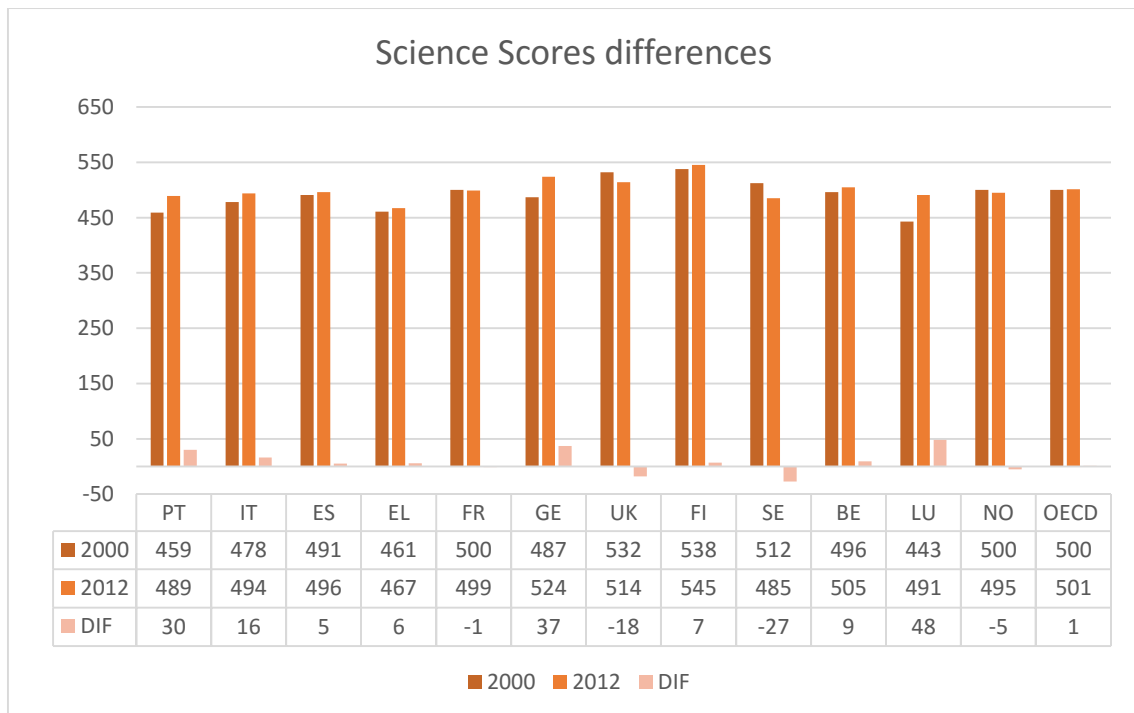


Figure 20 PISA results, Science general scores differences, 2000-2012



Despite Southern countries visibly demonstrate a disadvantage when compared with northern and Central Europe, PISA results are capable of showing the real effort from these 4 countries in order to improve and to approach the European context and OECD benchmarks. Data

demonstrate that these countries had, in all cases, a positive growth (only with the exception of Greece and Spain in the reading scale).

Although the higher scores from other countries, it is also revealed that those same countries have lower and, in some cases, even negative growth trends.

Sweden is, for example, a notorious case of loss. This country falls at all levels considered being, at some cases, even below southern countries.

6- Conclusion - Where's Southern Europe?

Crisis is severely affecting southern Europe: The unemployment rates are increasing, particularly those concerning the youngest; brain drain phenomena is patterning the scientific communities in these countries; governments maintain their plans of reduction educational expenditures; as welfare-states are also being engaged through several cuts – pensions, reforms, social programs.

The data over the structure and outputs of education systems in the four Southern European Countries (Portugal, Spain, Italy and Greece) suggests two things: First, the existence of a substantial effort on the part of these countries to overhaul their education and training systems and increase their performances (by reaching European demands and targets emerged at Lisbon Strategy and now its similar 2020 Agenda.) Second, a considerable gap remains between these countries and their achieved levels of qualifications, and those reached by Central and Northern European member states.

This report showed both their conquests – early schooling leaving decrease; improvements on schooling rate, graduations rates, PISA results- their fragilities – highest unemployment rates; lowest proportion of tertiary graduates; declines on performance – and major crisis consequences to educational systems – severe budgetary cuts.

Austerity has been, after 2010, the dominant political response to the crisis, implying the curtailing of public investment and thus the state funding directed towards education and training. Mass unemployment and drastic slowdown of economic activity and workers income may have also potentially changed both the will and ability of families and business to invest in education and training.

We may consider that these countries have a certain incomplete trajectory on education, somehow interrupted with the economic crisis. It is therefore of the most importance to assess if and how the trajectory of convergence of the Southern European countries regarding

education and training is being affected by this current crisis and the policies devised to address responses.

One note goes to PISA. The crisis triggered a set of policy and measures embodied in “cutting” responses. However, the possibility of explanatory ideological factors over the cuts severity also has to be considered. In fact, the improvements in southern Europe within PISA assessment can reinvigorate this discussion. Highest Scores are result from earliest policies adopted. This means that despite the fragilities of these countries, where education policy acts towards the right targets, the results are always even more positive. Therefore, it’s well know the liberal educational policies that were adopted at Sweden and other northern countries, responsible, we might say, for this proficiencies decreasing. Some of those measures are to be expected to enter in our own political package. What main consequences could be expected from these political choices? What main impacts could

Rodrigues”, Maria de Lurdes, João Sebastião, João Trocado da Mata, Luís Capucha, Luísa Araújo, Mariana Vieira da Silva e Valter Lemos (2014), “A construção do sistema democrático de ensino, in Rodrigues”, Maria de Lurdes (org.), *40 Anos de Políticas de Educação em Portugal - Volume I - A construção do sistema democrático de ensino*, Lisboa, Almedina, pp.35-88

Summary:

- 1) Democratization background (1955-1974)**
- 2) Rupture and institutionalization of new rules (1974-1985)**
- 3) Development of the democratic education system (1986-2014)**

(1955-1974)

Democratization background

(2 periods)

3 Ministers in 19 years

Since the end of the 1940s schooling was organized only for 10 or more years old children, through a dual system: Lyceum schools (1947) and Technical schools (1948).

The Plan for Popular Education (Plano de Educação Popular) implemented in 1952 aimed to increase population educational achievement through primary school and adults’ alphabetization, turning compulsory education as the main access to the labour market. Compulsory education was of four years of schooling for those aged between 6 and 10 years old, corresponding to primary education -- compulsory in 1956 for men, and later in 1960 for women.

In 1959 the Ministry Leite Pinto (1955-1961) introduced in Portugal the Mediterranean Regional Project and its report (Projecto Regional Mediterrâneo -- PRM, OCDE), whose impact characterized a new cycle of 10 years of educational policies. Amongst the most important are: the change of compulsory education from 4 to 6 years of schooling in 1964 (until the first two years of lower secondary education), and in 1967 the implementation of a longer and unified basic education, placing pupils’ specialization after compulsory education.

These changes were divided into two periods and different Ministers for National Education: first with Galvão Teles (1962-68), and later with Veiga Simão (1970-74) -- **with Hermano de Saraiva (1968-70) in the middle.**

A) (1962-68)

Galvão Teles

- 1) 1964 – compulsory education increases up to 6 years of schooling, and is applied through several forms: regular schools and TELESCOLA –broadcasting and television schools (radiodifusão e televisão escolares);
- 2) 1967 – The educational pathways are unified, and the coexistence of three teaching modalities started from the 5th year of schooling, through several forms: **complementary of primary education, ciclo preparatório TV e ciclo preparatório direct.**
- 3) Tracking starts at 12 years old, and no longer at 10 years old (though this measure was not universally applied)

B) (1970-74)

Veiga Simão

- 1) Gratuity (gratuidade) and compulsory education up 8 years of schooling, including: 4 years of primary education+ first 2 years of lower secondary education + first 2 years of Lyceum schools or Technical schools; Vocational tracking postponed to 14 years old;
- 2) Compulsory education raised up to 8 years of schooling (definitely in 1973);
- 3) Unified curriculum and training for teachers since 1971 – through higher education schools and programs;
- 4) From 1971 the domains of intervention of the Ministry of Education became more diversified, starting in 1965 with the creation of the Office for Educational Research and Planning Action (Gabinete de Estudos e Planeamento da Acção Educativa, GEPAE), from the aftermath of the PRM) – the senior staff of this cabinet had later a crucial role in the Ministry of Education during the democratic system;
- 5) In the 1960s, there was an extensive network of primary education schools (**rede de escolas**) while for lower and upper secondary education there were only 100 schools located mainly in district centers and including already lyceum and technical, industrial and commercial schools. In the 1970s, there were 26 000 teachers, from which only 6000 (23%) were professionalized.

(1974-1985)

Rupture and institutionalization of new rules

(2 periods)

A) (1974-1976)

Rupture with the previous models

- 1) 6 Ministries of Education in two years;
- 2) Opening the political debate on the universal access to: upper secondary education, higher education, adults education and training (Associação de Educação Popular), pre-school and special education.
- 3) 1974 -- Changing pupils' evaluation scales for both basic and secondary education: from 0 to 20 to 1 to 5; Giving preference for internal evaluation of students instead of national exams;
- 4) 1975 – return to 6 years of compulsory education and to an unified educational system at both basic and secondary educational levels.
- 5) However, higher education was approached has being unable to absorb the increasing demand (small-scale infrastructures, limited resources); The solution found was implementing measures to limit its access: abolishing the aptitude exam and implementing compulsory before entering higher education.
- 6) Creation of democratic elected commissions in school and the institutionalization of teachers' unions, leaving for the centralized services the definition of pedagogical and curricular orientations.

B) (1976-1986)

Looking for a new paradigm

The Portuguese Constitution was approved in 1976, recognizing the importance of teachers' and students' participation in the management of schools' bodies, and the role of the state in creating and promoting a public educational system, pre-school included.

- 1) 7 ministries of Education in 10 years
- 2) 1976 – recognition of Popular Education Associations, and creation of evaluation exams specific for adults. In 1979 there was the National Plan for Adults' Literacy and Basic Education (Plano Nacional de Alfabetização e Educação de Base de Adultos), and the recognition that the Ministry of Education was the formal responsible for this matter.

- 3) 1977 – creation of a pre-school public system and training schools for early childhood educators; in 1979 definition of the status of early childhood educators;
- 4) 1978 – confirmed the 6 years of compulsory education
- 5) 1979 – the principle of inclusion was mentioned for regular education, together with the universal, compulsory and free basic education (which included explicitly tuitions, food and food supplements, accommodation and economic aids). The guarantee of such rights became the responsibility of each municipalities together with the central and regional services of the Ministry of Education; later in 1984 the municipalities became responsible for buildings, equipment, social aids and school transports for pre-school and basic education;
- 6) in 1977 - implementation of one more year in upper secondary education (ano propedêutico, in 1979, becoming the 12th year of schooling); in 1978 – common track was applied for upper secondary education, and later in 1980 implementation of two upper secondary tracks (academic and professional) allowing access to high education; Later, in 1983, implementation of the technical-professional education, and in 1984, creation of an initial training for youth in apprenticeship regime.
- 7) Higher education access: 1977/78 – reintroduction of external evaluation for access to high education, and in 1979 implementation of numerous clausus;
- 8) 1979 – reinforcement for the demand of diploma and credentials to access the labour market, particularly for public servants (at national, regional or local level).
- 9) 1979 – definition of docent staff status and the Escolas Superiores de Educação (ESE) – beginning with the professionalization of all teachers and for all the educational levels – with no centralized management and curriculum.
- 10) 1976/77 – decentralization and democratization of school management, recognizing also some pedagogical autonomy, and in 1977 institutionalization of the relations between the Ministry of Education and association of parents and tutors for basic education , widened in 1984 to all levels of education;
- 11) 1979 – freedom of choice principle including private education Freedom of education law and Foundations of Private and Cooperative Education (Bases do Ensino Particular e Cooperativo) in 1982 – allowing public funding for private education
- 12) 1982 – creation of the National Council of Education (Conselho Nacional de Educação CNE), under the direct supervision of the Ministry of Education
- 13) The Minister of Education Veiga da Cunha (in 1979-1980) prepared the entrance of Portugal in UEE, ordering to OCDE an exam on the national education policy (1981-1983) and a study on the Portuguese Educational System, approaching subjects such

as professional education; diversification of secondary education tracks; school success and early school dropouts; decentralization of competences; teachers training.

(1986-2014)

Developing a democratic educational system

(6 periods)

A) (1986-1991)

Educational reform and the compromise between all political parties

- 1) 1986 - The Foundation Law on the Education System (Lei de Bases do Sistema Educativo, LBSE 1986)
- 2) Recruitment of thousands of teachers while improving their professional status, with new referential for their training
- 3) Basic compulsory education up to 9 years of schooling
- 4) 1989 – curricular reform of three cycles (1st, 2nd and 3rd) into basic integrated schools offering only compulsory education, followed by three years of upper secondary education
- 5) 1989 – creation of professional schools and technological courses; Vocational education from upper secondary education
- 6) Financing through structural funding (PRODEP, UE) and decentralization of schools' management
- 7) 1985-87 -- Creation of the Commission on the Reform of the Educational System (Comissão para a Reforma do Sistema Educativo, CRSE) and the Regional Board of Education in 1987 –1989 (Direções Regionais de Educação) responsible for social aids; 1989 – Creation of the Institute for Educational Innovation (Instituto de Inovação Educacional, IIE) responsible for monitoring education in Portugal.
- 8) 1988/89 — implementation of the Interministerial Program to Promote Educational Success (Programa interministerial de promoção do sucesso educativo, PIPSE)

- 9) 1991 –the Private Institutions of Social Solidarity (Instituições Particulares de Solidariedade Social, IPSS) became responsible for the main network of pre-school offer
- 10) 1991 – repeal of the law 1977/78 concerning special education, turning it more inclusive in regular education, but still the majority of pupils with specific needs were to special education schools
- 11) 1991 – for adults’ education – creation of the recurrent teaching, organized as night schedules for adults with the same curricular and pedagogic programs as daily programs for children

B) (1991- 1995)

Sustainability and evaluation

- 1) 3 ministers of education
- 2) 1992 - Controlling access to higher education: Students’ assessment through general knowledge exams and implementation of tuitions of attendance
- 3) 1992 - For teachers from non tertiary education: first assessment serving as an instrument for control of career progression;
- 4) 1991 – with the supervision of IIE, Portugal participated in 1991 for the first time in a comparative study of the achievements in mathematics and Science of 9 and 13 years old students in 10 countries -- the Second International Assessment of Educational Progress (IAEP II, co-ordinated by the Center of the Assessment of Educational Progress, a division of the Educational Testing Service. (ETS, Princeton, New Jersey), and in 1995 participated in a comparative study measuring trends in mathematics and science achievement at the fourth and eighth grades -- the Trends in International Mathematics and Science Study (TIMSS, co-ordinated by the International Study Center, Lynch School of Education in Boston College(before PISA)
- 5) 1990s - Until 1994 there was very limited coverage and mainly in the private and social sectors, and by then a study is ordered by CNE in 1994, whose impact led to the approval of compulsory pre-school education attendance for all children with 5 years old, and the construction of thousands of new spaces.

C) (1995-2002)

Priority: improving quality of educational provision

- 1) 4 ministries
- 2) 1996 -- To fight against school failure and early school dropouts, the government improved school library networks and implemented the Educational Territories of Priority Education (Territórios Educativos de Educação Prioritária, TEIP); in 1999 and 2003– implemented also the Integrated Program for Education and Training (Programa Integrado de Educação e Formação, PIEF), and the Program for the eradication of Child Labour (Programa de erradicação do Trabalho Infantil, PETI)
- 3) 1996/97 – changes for higher education access: in the national exams and in the new calculation for tuition
- 4) 1997 – Framework law for Pre-school (Lei-Quadro do Pré-escolar) defining its national network, organization and funding and articulation with basic education; in 2000 – school clustering included from pre-school to basic education, changing the numbers of the infrastructure from 14000 to 1400.
- 5) 1999 - Adults' education — creation of the National Agency for Education and Training of Adults (Agência Nacional de Educação e Formação de Adultos, ANEFA) under the tutelage of two Ministries: Ministry of Education and Ministry of Labour; 2000 – implementation of Adults' Education and Training courses (Educação e Formação de Adultos, EFA); 2001 — implementation of a System for Recognition, Validation and Certification of Competences (Sistema de Reconhecimento, Validação e Certificação de Competências, RVCC) which until 2005 certified 25 000 adults.
- 6) 1996 and 1998 – cancellation of the assessment for non-tertiary education teachers' as an instrument of an instrument for control of career progression
- 7) 1997 – IIE is replaced by the Office of Educational Assessment (Gabinete de Avaliação Educacional, GAVE)

D) (2002-2005)

Priority: improving upper secondary education

- 1) 2 ministries
- 2) Upper secondary approached as minimal education achievement for school success, concerns related to euro entrance: 2004 – introduction of professional trainings in public secondary schools, and implementing a campaign focusing on the importance of 12 years of schooling achievement

- 3) 2005 – implementation of national exams in Portuguese and Mathematics at the end of lower secondary education
- 4) After 2000: Integrating school centers in one organizational, curricular and pedagogical unit, from primary education to the end of lower secondary education.

E) (2005-2011)

Priority: improving school success

- 1) 2 ministries;
- 2) Main concern: early school leavers (reduced from 39% in 2005 to 23% in 2011). Multi-focus approach: special education and pre-school coverage, lower and upper secondary attainment, adults' education attendance, and schools' internal organization;
- 3) Extinction of horizontal school clusters, requalification and modernization of the school park – in primary education (about 600 interventions), in lower secondary (76 interventions), and in secondary schools (2007 – the implementation of the Technological Plan for Education (Plano Tecnológico da Educação, PTE) – technology, contents and training, applied for all levels of education; 2007/2008 – closing schools with less than 10 students, and reinforcing school transport networks; 2010 -- closing schools with less than 21 students;
- 4) 2005 – Changing teachers and classes organization in schools, for instance: when teachers are absent it became required (or compulsory) to find a suitable replacement; implementing compulsory activities in the school – recover and monitoring students attending basic and secondary education and showing significant difficulties and risks of school dropout or failing education; 2006 -- placing teachers in schools on a pluriannual basis;
- 5) 2006 – the international survey which evaluates education systems worldwide by testing the skills and knowledge on literacy in mathematics, science and reading of 15-year-old students-- the Programme for International Student Assessment (PISA) – had indicated low scores for students in Portuguese schools, leading to the approval of the following measures: 1) Action Plan for Mathematics (Plano de acção para a Matemática) and National Reading Plan (Plano Nacional de Leitura); 2) improving training for primary school teachers in Portuguese and Mathematics;
- 6) 2009 – Making direct correspondence of school economic aids with direct family allowance scale/echelon in social security (which resulted in a growth of 140% when comparing 2007/2008 with 2009/10) -- this included also scholarships for those

continuing in upper secondary education; 2008 – school pass for those between 4 and 18 years old.

- 7) 2008 – changing the methodology to referee and evaluate for Special education, and creating a network of expertise in public schools.
- 8) 2009 – Pre-school enrolment became universal for 5 years old children
- 9) 2005/2006 –full time primary education through curriculum enrichment organized together with the municipalities (focus in English language and school meals);
- 10) 2005 – measures to achieve universal basic education attainment: generalization of alternative curriculum offer for students with no diploma and overcoming the maximal age for compulsory education: implementation of three years courses of Education and Training in basic education (Cursos de Educação e Formação, CEF, about 30000 students).
- 11) 2005 – Improving upper secondary education attainment: professional tracks framed in the same school as academic upper secondary education; 2009 – compulsory education up to 12 years of schooling (corresponding to upper secondary education);
- 12) 2005 – adults' education through the implementation of New Opportunities Initiative (Iniciativa Novas Oportunidades, INO) for Youth and Adults; 2007 creation of NO Centers in regular schools, in schools' clusters and in training institutions (total 500), and creation of the National Agency for Qualification (Agência Nacional para a Qualificação), responsible for the execution of educational and training policies for youth and adults (about 1 million of inscriptions, from who 350 000 (35%) obtained certification for basic and secondary education level)

F) (2011 – 2014)

Rupture of the previous educational consensus

- 1) 1 minister;
- 2) 2014 – the new basic and secondary school infrastructures represent more than 77% of the school park, and the existing 140 000 teachers were almost all professionalized;
- 3) The Euro crisis imposed the need to reduce
- 4) the expenses in education in 195 million euros: rationalizing school networks, creating new types of school clusters, reducing the recruitment of human resources and the transfers to private schools – though the funding of private education increased instead;

- 5) Focusing in the fight against the Portuguese education deficit and early school leaving: improving the quality and offer of secondary education through a professional training aiming to bridge education and training with labour market. This meant the reimplementation of a dual system -- vocational and academic -- in basic education and from 12 years old, abolishing the unification of education until 15 years old. National exams are applied in the end of each cycle -- at the end of primary education (4th grade), at the end of the two stages of lower secondary (6th and 9th grades) and at end of upper secondary (12th grade).
- 6) Adult education became applied mainly to bridge training with employment, abolishing INO and return to recurrent teaching.