



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

University Institute of Lisbon

Contents of the document

Four National Reports

Portugal (from page 1 to 75 of the document)

Spain (from page 76 to 120 of the document)

Italy (from page 121 to 190 of the document)

Greece (from page 191 to 258 of the document)

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LIST OF TABLES AND FIGURES	3
A1. NATIONAL CONTEXT DESCRIPTION	5
Annexes.....	10
A2. EDUCATIONAL SYSTEM.....	16
Annexes.....	25
A3. PROCESSES AND MECHANISMS OF MONITORING AND EVALUATING THE EDUCATIONAL SYSTEM	39
B1. EQUITY SECTION.....	48
Participation and access	50
Adult’s education initiatives	52
School population diversity – ethnical background, immigrants and special education	53
Attainment and schools results – levels of success and failure.....	55
Describing the population attainment	55
Retention rates	55
PISA Results and ESL Rate	58
Strategies for promoting success and equity	59
Educational expenditure /funding	60
Annexes.....	64
B2. CONCLUSIVE NOTES	69
References.....	71

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 on dary 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

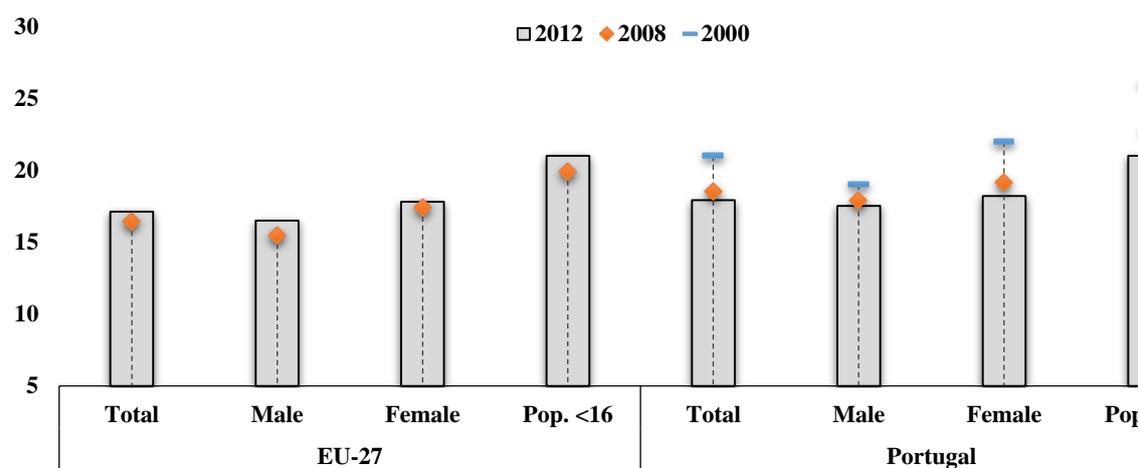
Table A1.2. Risk of poverty rate (%), by sex, in Europe 27 and Portugal (2000-2012)

	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

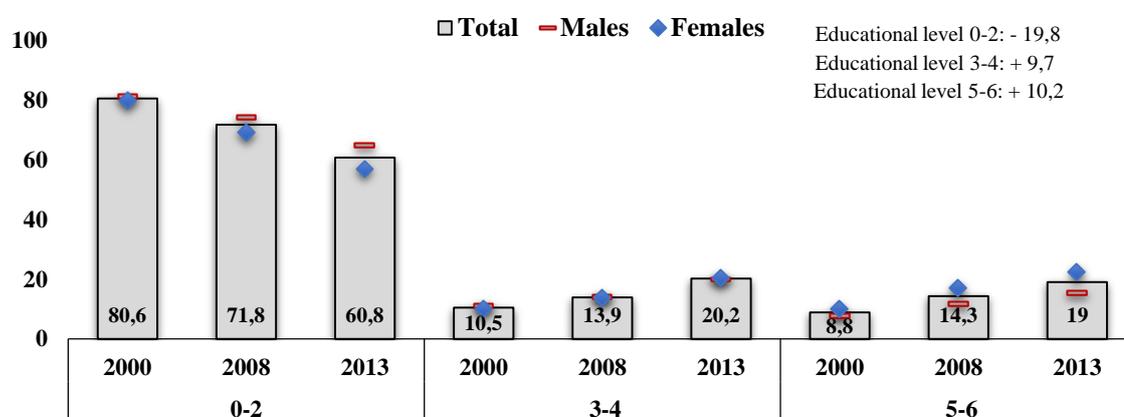
Figure A1.1 Men and women at risk of poverty rate (60% of median equivalised income after social transfers), and youth age less than 16 years old, in EU-27 and Portugal (2000-2012).



Source: Eurostat

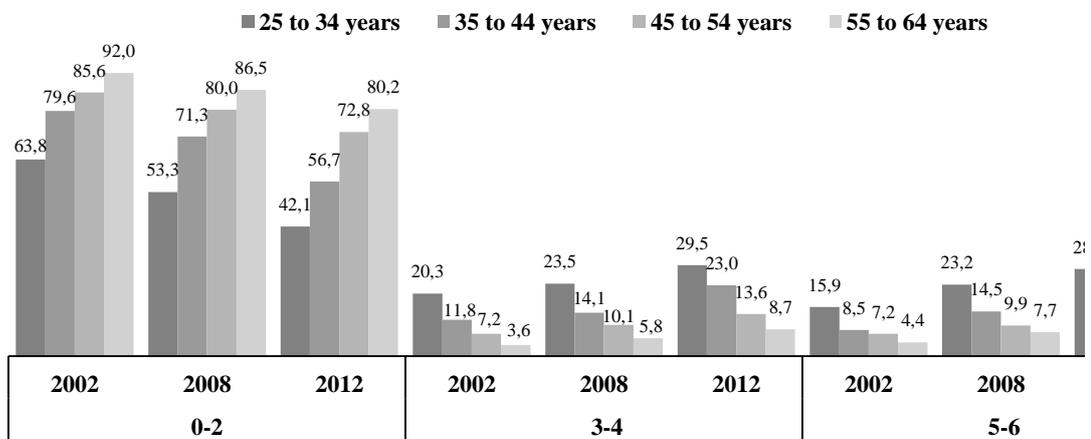
Note: Data for EU27 for 2000 is not available

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



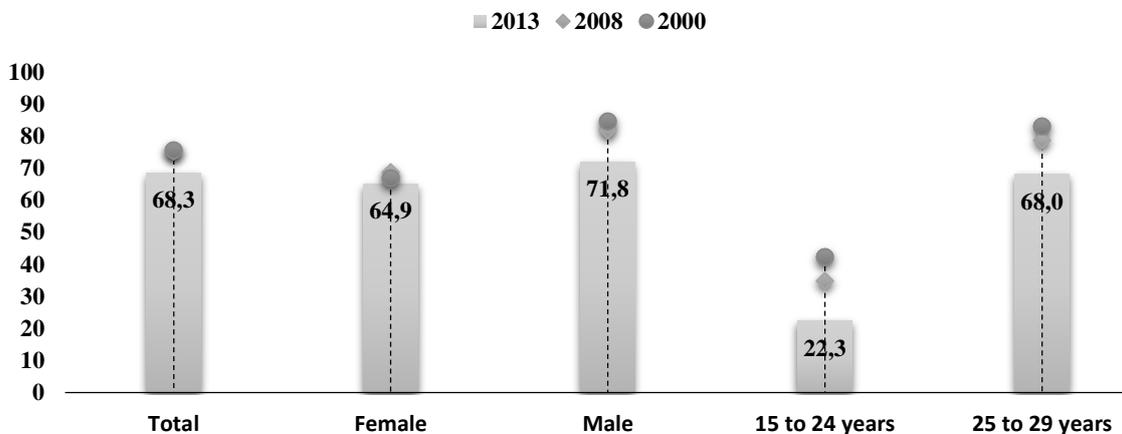
Source: Eurostat

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



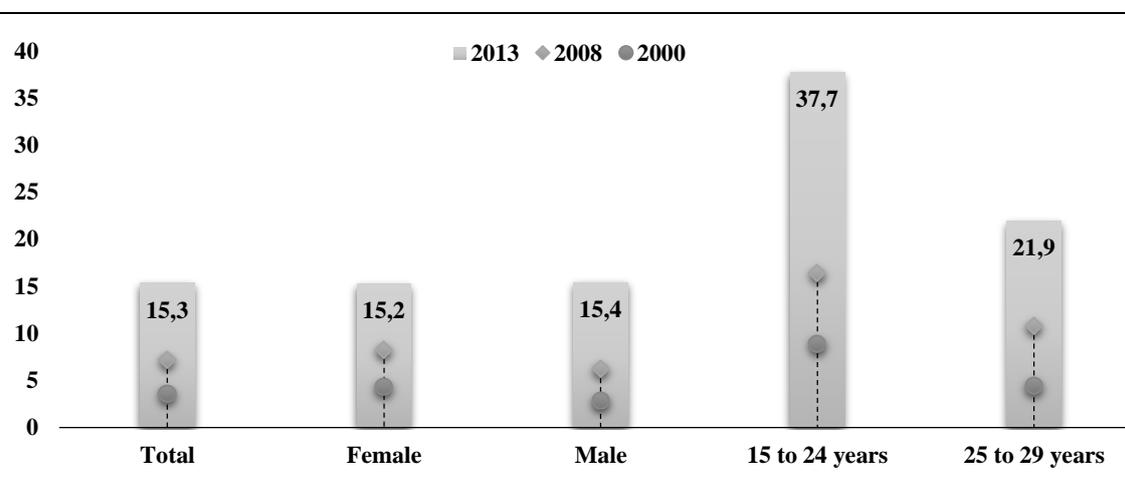
Source: Eurostat

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



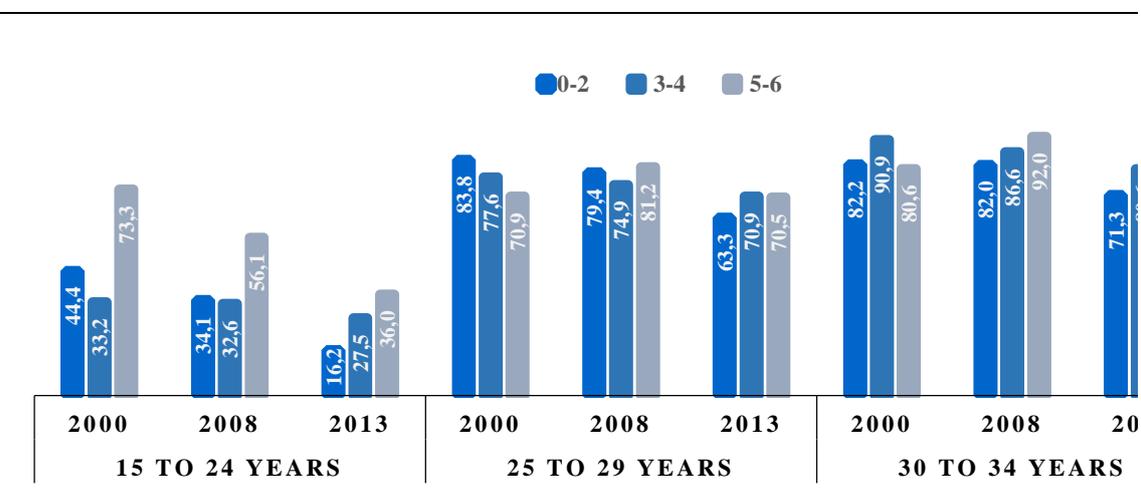
Source: Eurostat

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



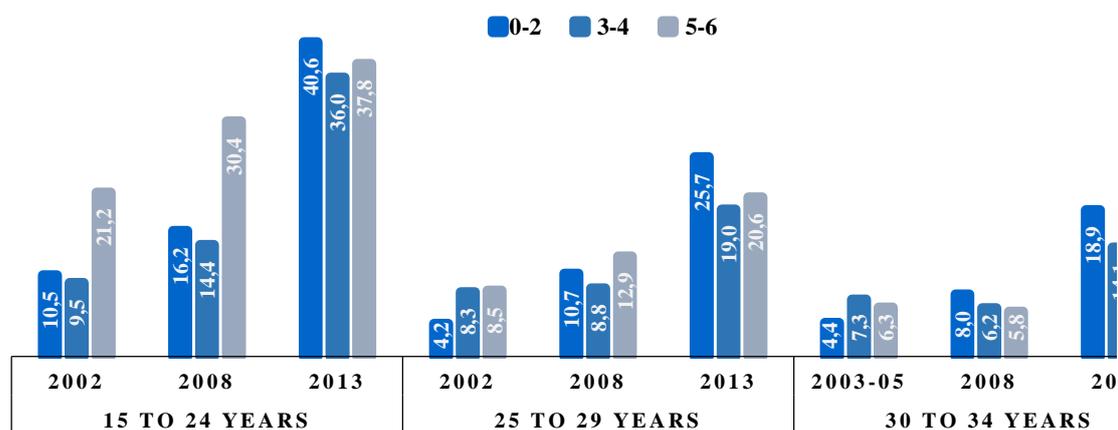
Source: Eurostat

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



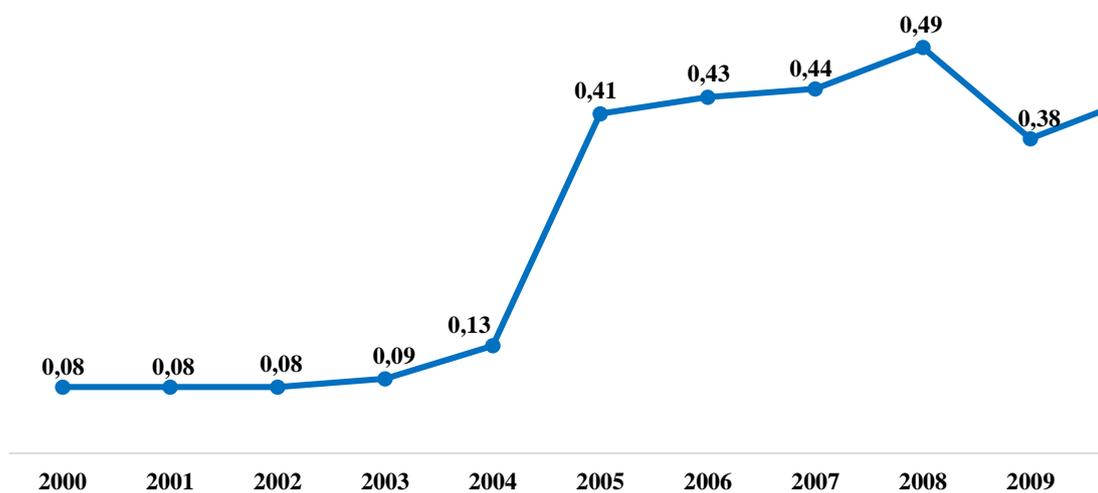
Source: Eurostat

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
Eurostat	5,4	5,4	5,3	5,4	5,1	5,2	5,1	5,1	4,9	5,8	5,6	:	:
INE	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
Pordata/DGO	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 polytechnic 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, IEFP), in technological schools (set up under joint ministerial

¹² Law no. 85/2009, August 27

¹³¹³ 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). 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). (Rodrigues et al, 2014). 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).

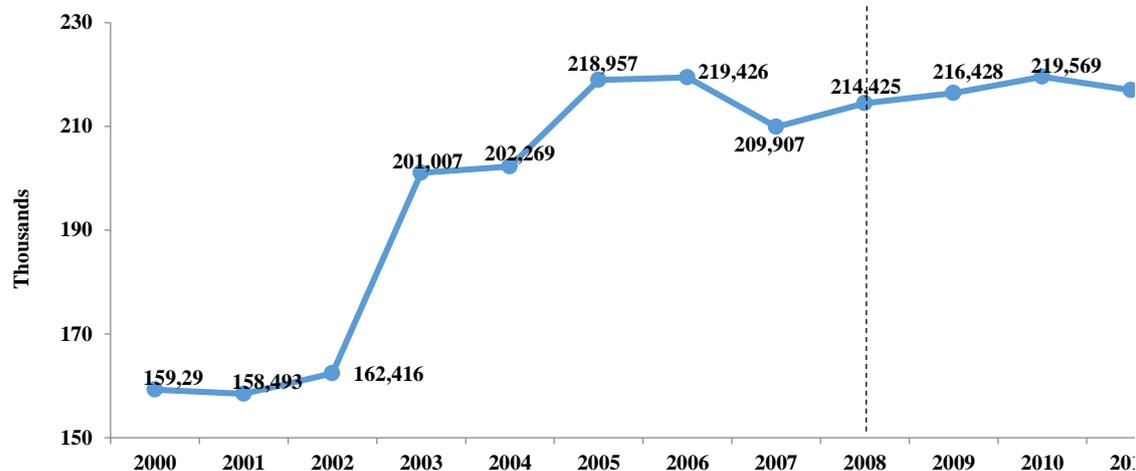
onwards, a trend that will be even more evident from 2013. This is due to the interruption of NO process since 2013, and adults' education taken on by the Qualification and Vocational Training Centres and the National Agency for Qualification and Vocational Training (Agência Nacional para a Qualificação 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.

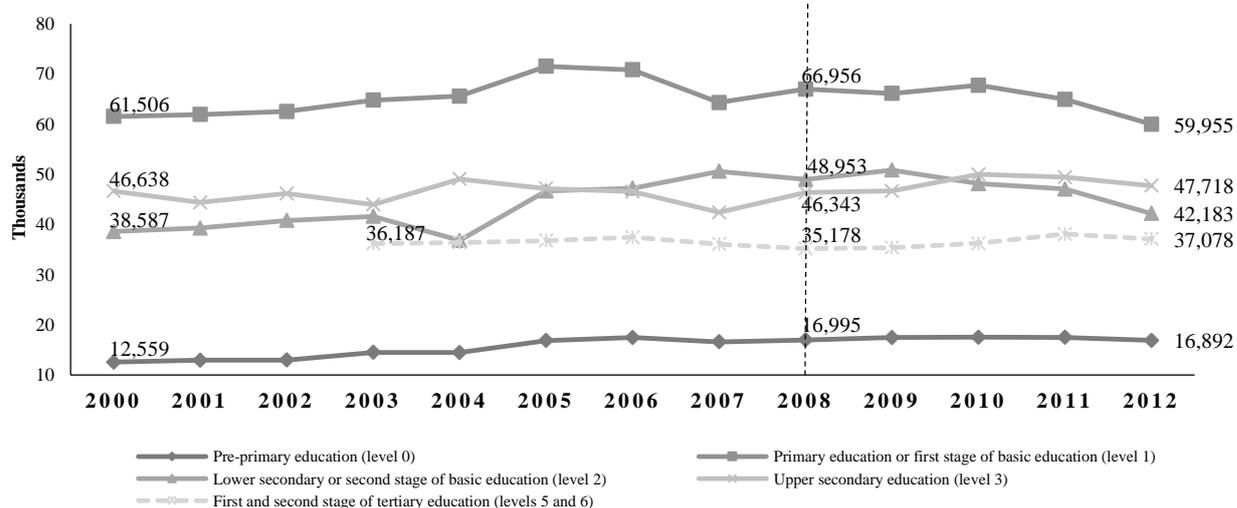
Annexes

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



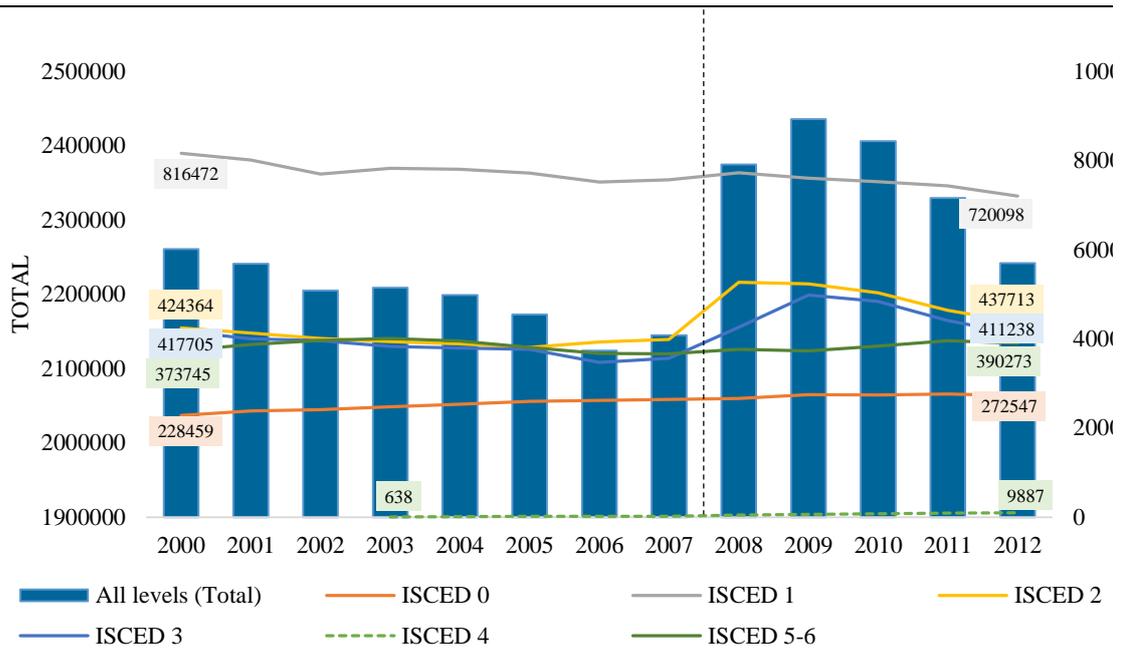
Source: Eurostat

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



Source: Eurostat

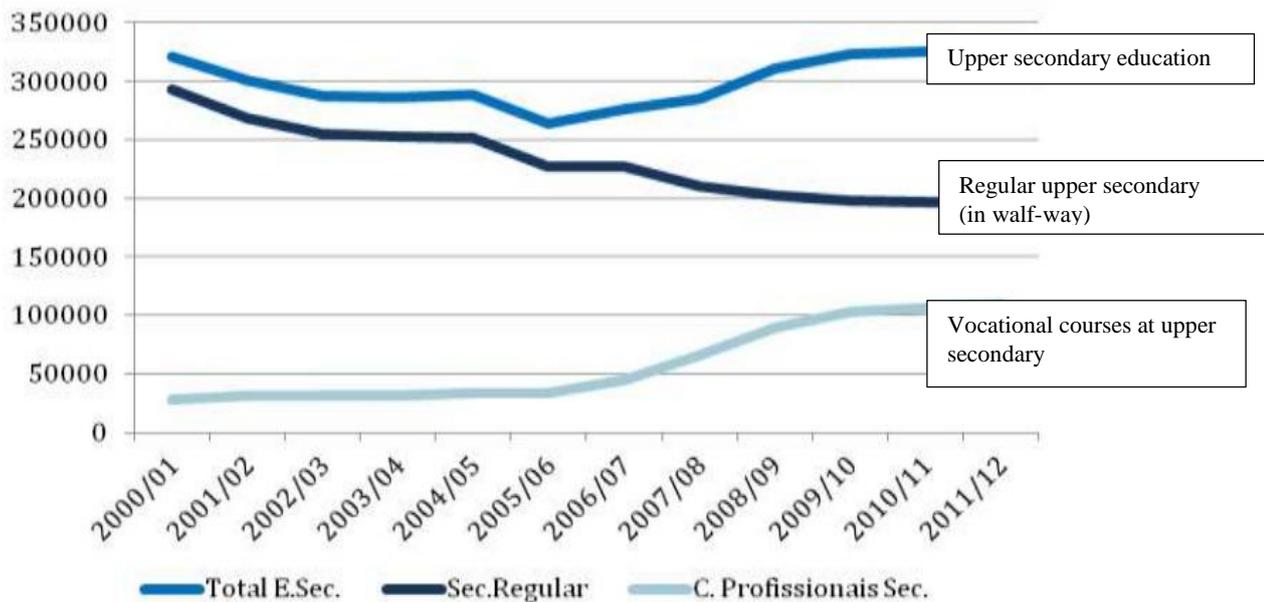
Figure A2.3 Number of students in Portugal, by educational levels, 2000-2012



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)



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_profduar.pdf

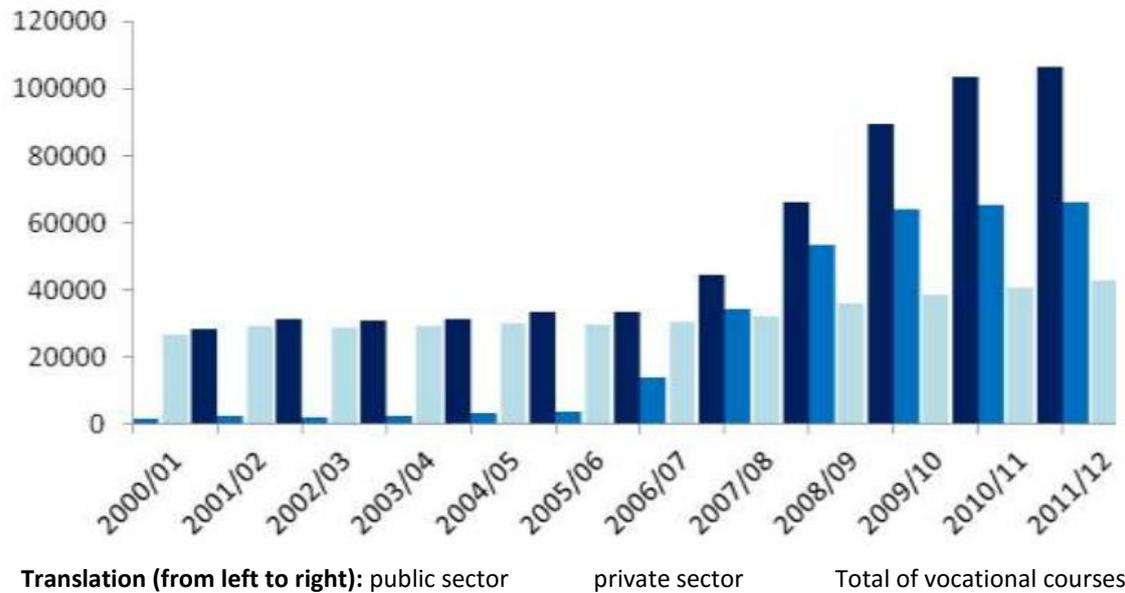
Table A2.1 Annual change rates in the number of enrolled young secondary, via education, public and private, in mainland Portugal 2001-2012 (%)

	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 secondar y	-6,5	-4,2	-0,4	0,6	-8,3	4,7	3,2	9,2	3,8	0,9	1,1
Regular upper secondar y	-8,1	-5,3	-0,9	-0,2	-9,6	-0,2	-7,3	-3,9	-1,9	-0,5	-0,9
Vocation al 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)

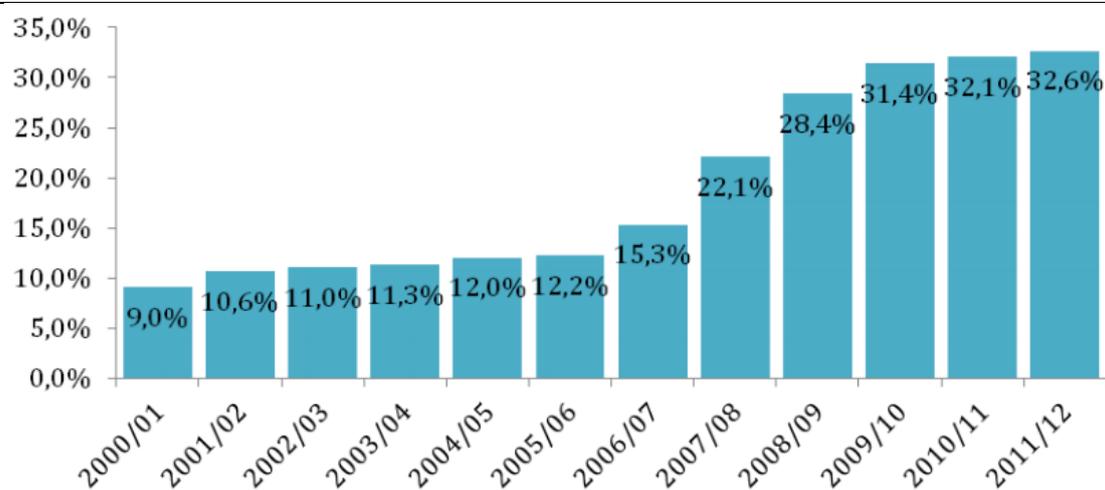
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profduar.pdf

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)



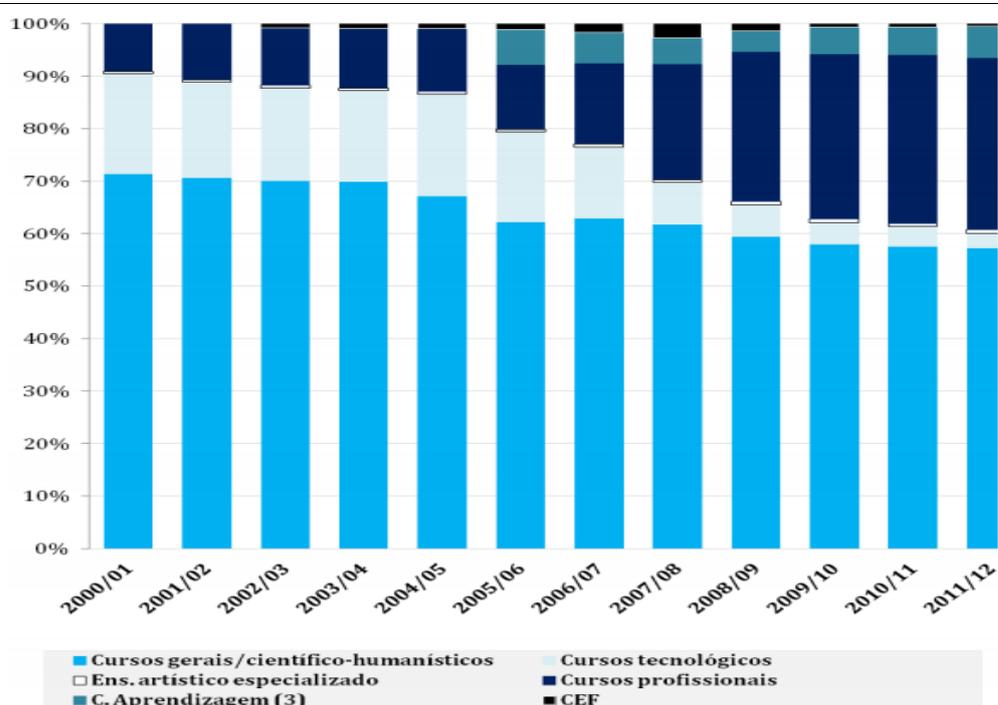
Source: DGEEC (GEPE) (2000-2012) - Adapted from CNE Technical report Ensino e Formação Profissional Dual (2014), pp.17, Figure 3 (Gráfico 3)
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profduoal.pdf

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_p

Translation (from left to right): General courses /scientific-humanistic; Specialized artistic education; learning courses; tech studies; occupational courses;

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
Mainland portugal	89	571	15 041
Alentejo	14	67	2 015
Algarve	1	7	125
Centro	32	151	4 737
Lisboa	19	159	5 383
Norte	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

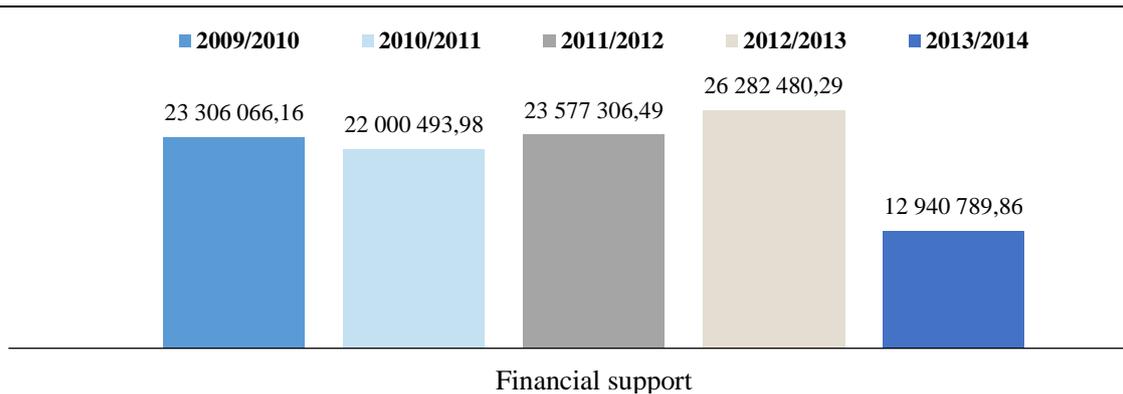
Note: (*) Inclui projetos de parceria ao abrigo da Portaria nº 1102/97, de 3/11

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
North	7 024	6 386	5 679	5 192	6 882	6 108	7 271	6 329	2 326	2 173
South (Algarve)	39	39	27	26	27	27	31	30	42	40
Center	1 933	1 717	2 021	1 781	2 066	1 796	2 470	2 151	1 302	1 182
Lisboa	2 547	2 290	3 075	2 789	2 352	2 128	2 757	2 514	2 988	2 701
South-central (Alentejo)	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

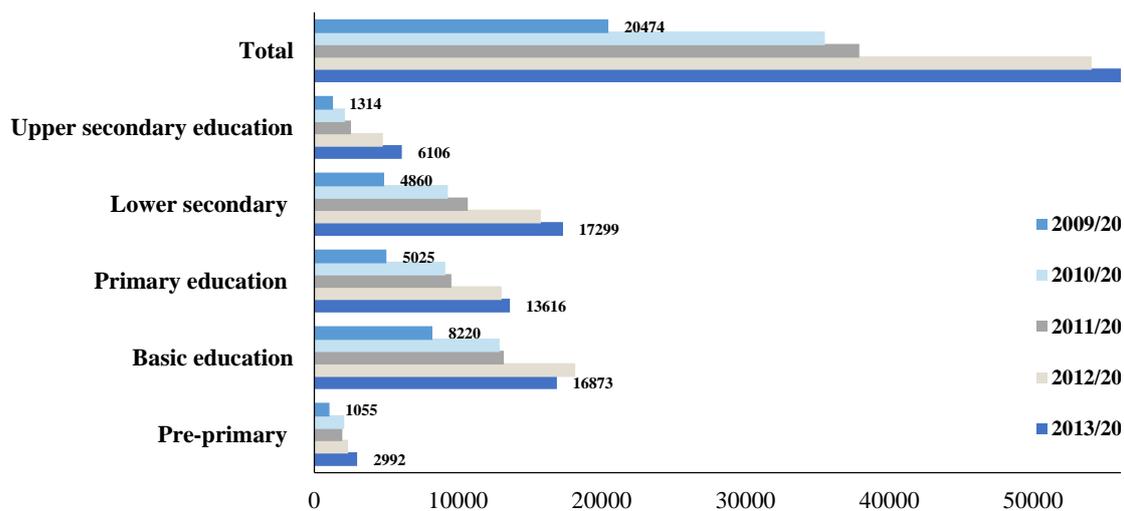
Source: Adapted from CNE Estado de Educação (2013), pp.129, Table 3.2.5 (Tabela 3.2.5)
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profducal.pdf

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

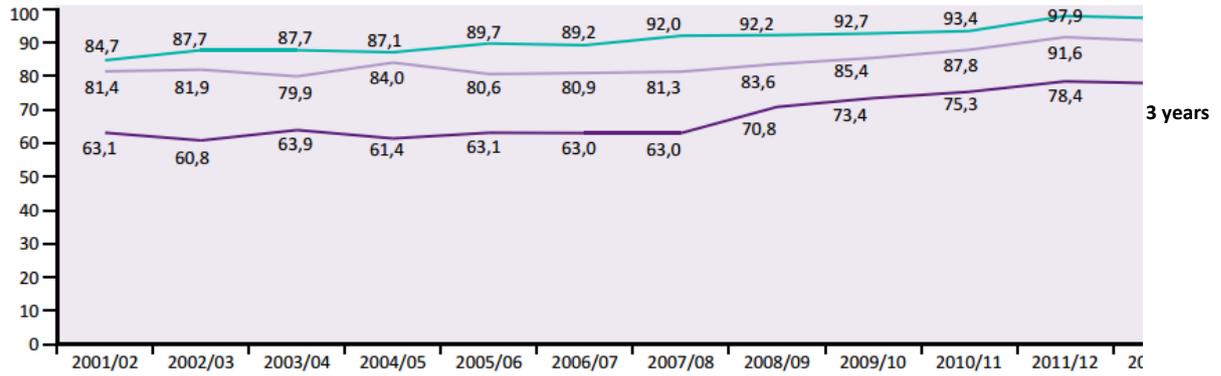
Figure A2.9 Evolution of the number of students with SEN, by cycles and levels of education, Mainland Portugal (2009-2014)



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

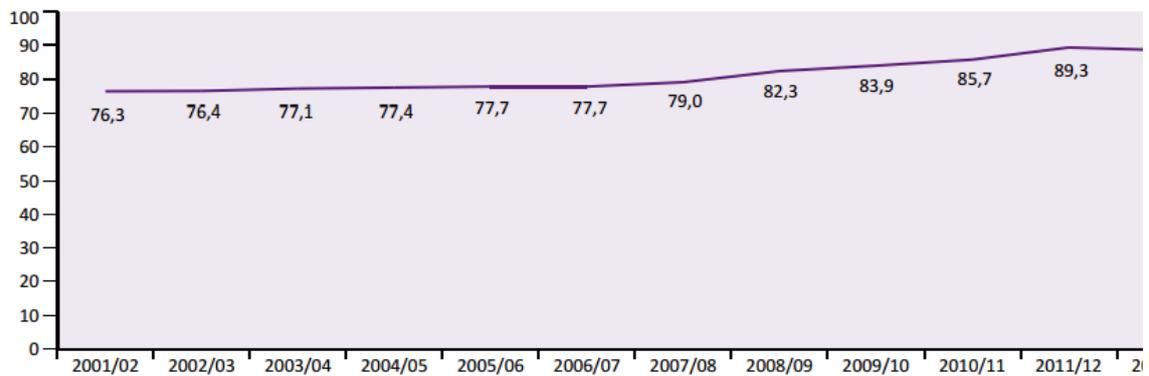
Figure A2.10 Evolution of pre-school enrollment rate (%) by age (5, 4 ad 3 years) Portugal

5 years
4 years



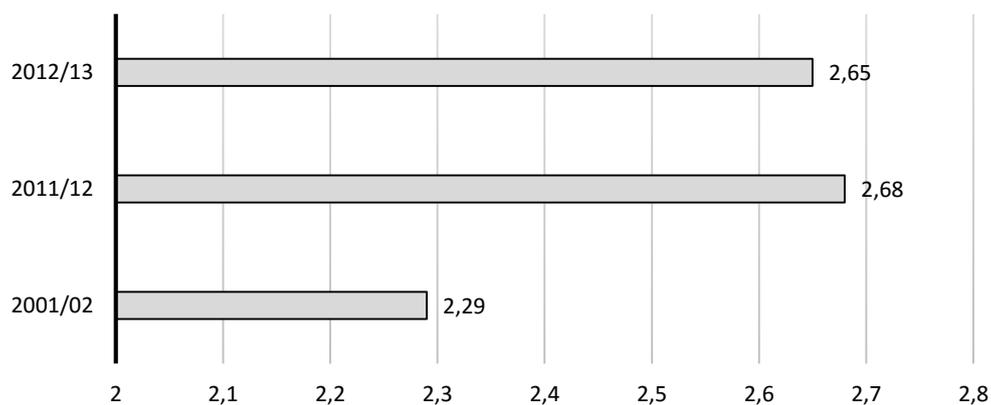
Source: Data and graph from CNE, Estado da Educação 2013, pp. 117, figures 3.1.4.

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



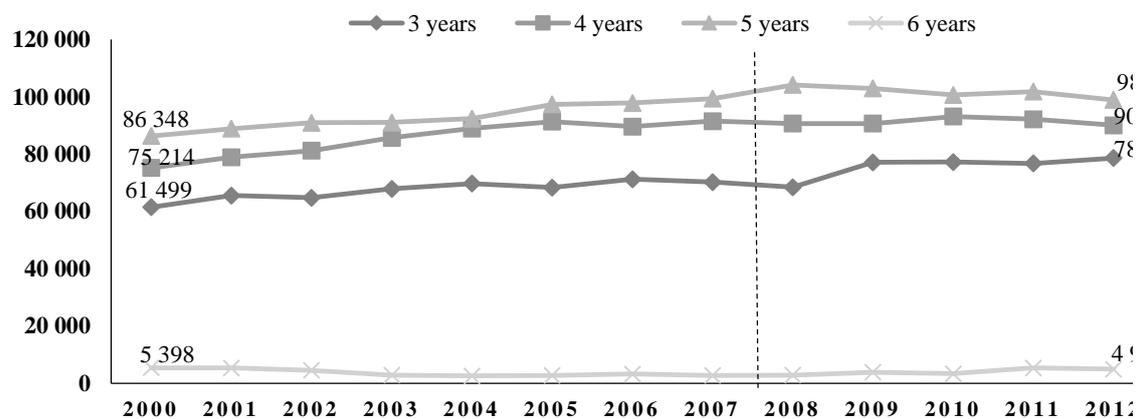
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 117, figures 3.1.5.

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



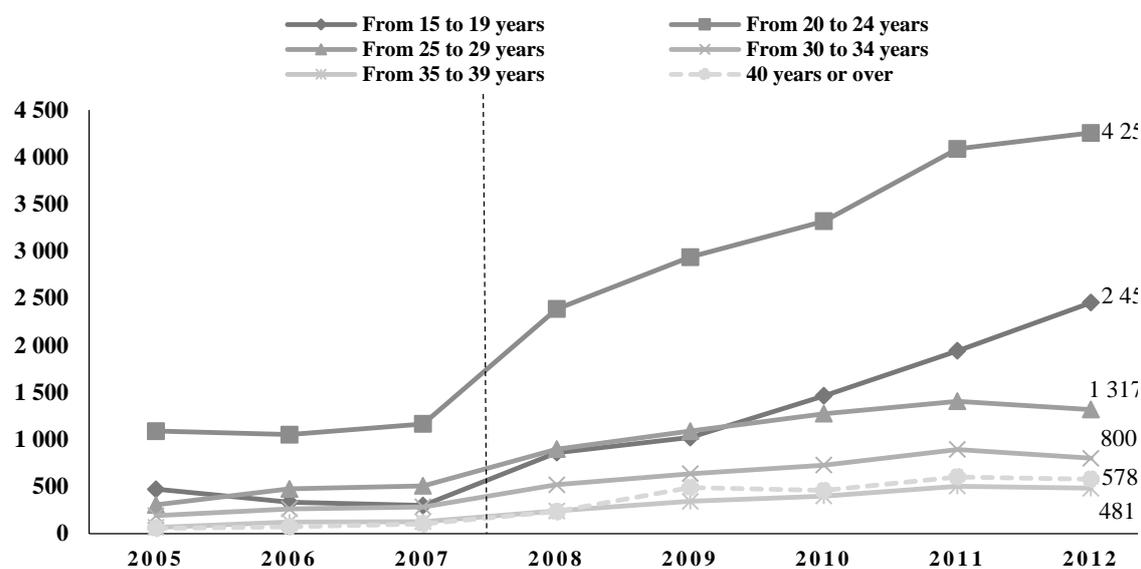
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 117, figures 3.1.6.

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



Source: Eurostat

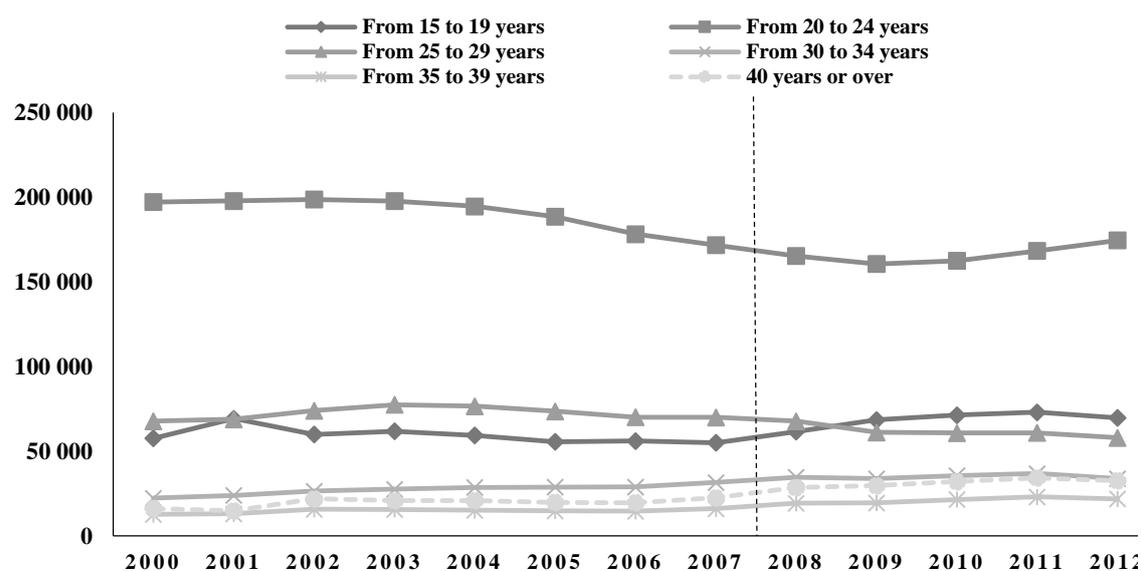
Figure A2.14 Participants post-secondary non-tertiary education- as % of inhabitants of the corresponding age group, in Portugal, (2005-2012)



Source: Eurostat

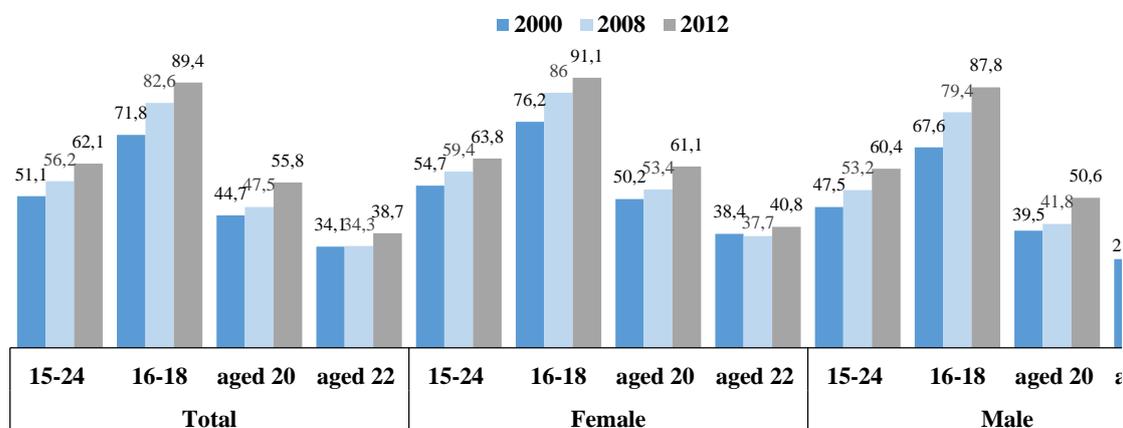
Note: Data before 2004 not available

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
	80	57	97	64
Total	137		161	

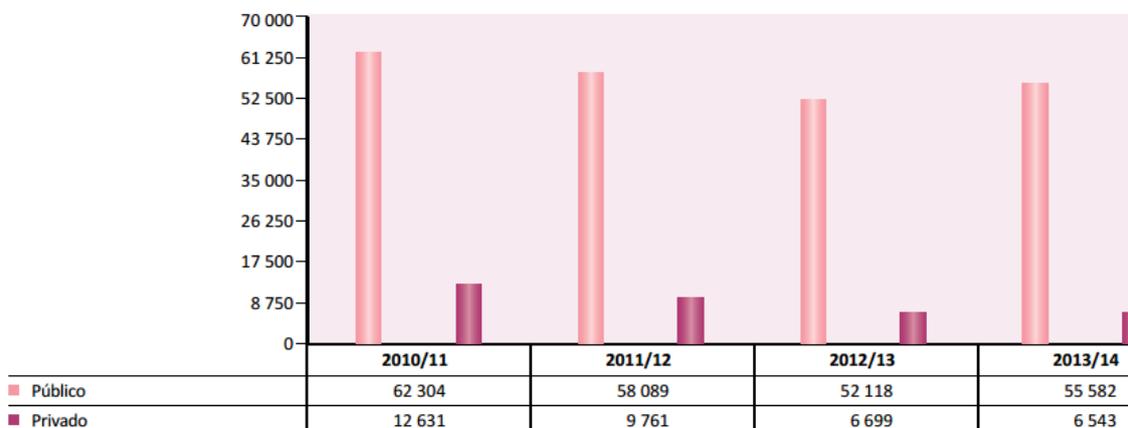
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 93, figures 2.3.2.

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	Varição 2011-2013	2011	2012	2013	Varição 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
Engª, 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

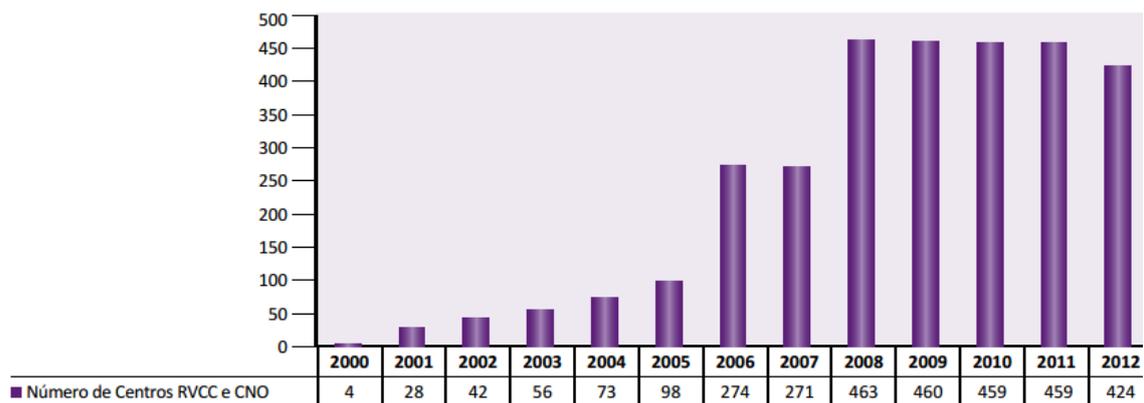
Source: DGEEC / DSEE – DEEBS, graph from CNE, Estado da Educação 2013, pp. 103, figures 2.3.11

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 and Palhares 2009, cited in 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 recommendation 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 recommendation 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). 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.

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

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

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

gypsies. 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).

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.

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 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

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

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 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 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 and ESL

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.

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. 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

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.

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:

- 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;

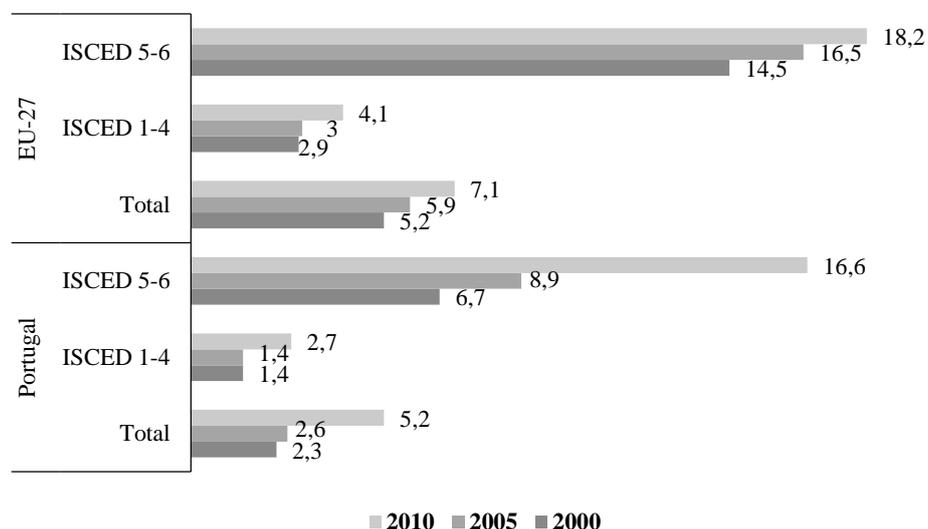
- The current intensification of vocational areas and Dual system, observed with the considerable increase in levels of expenditure but also the recent proposals for introducing vocational areas at the end of the second cycle of basic;

- 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

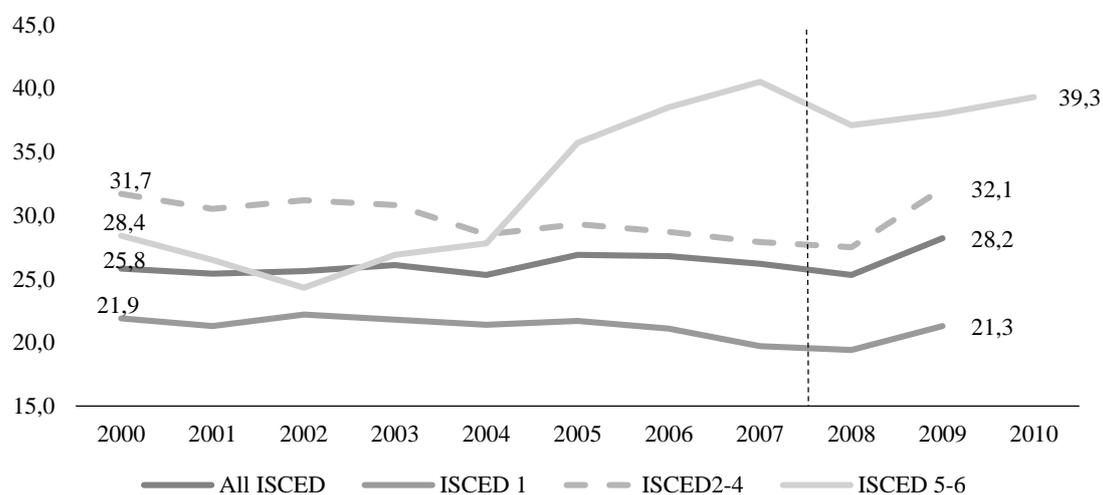
Annexes

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

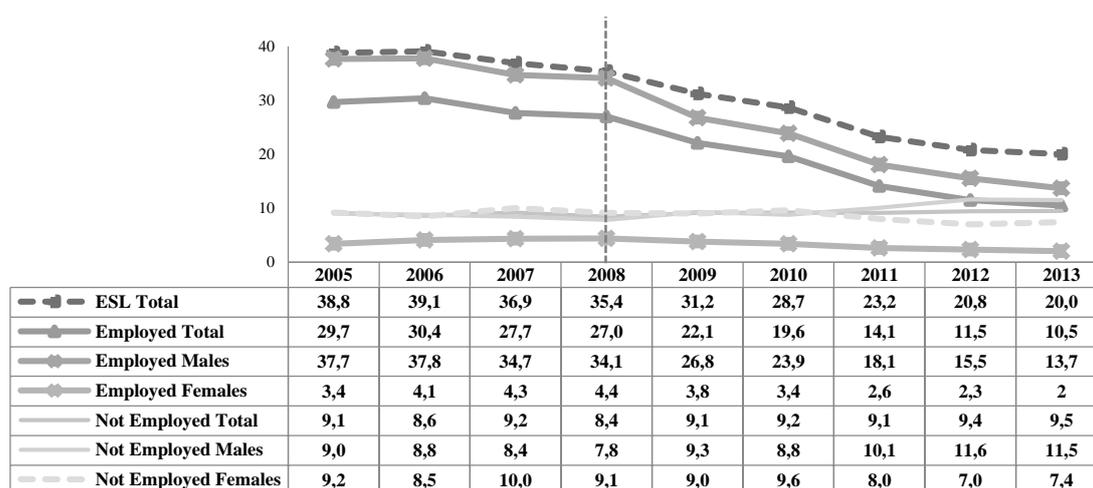
Note: Data for 2010 not available for ISCED 1 and ISCED 2-4

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

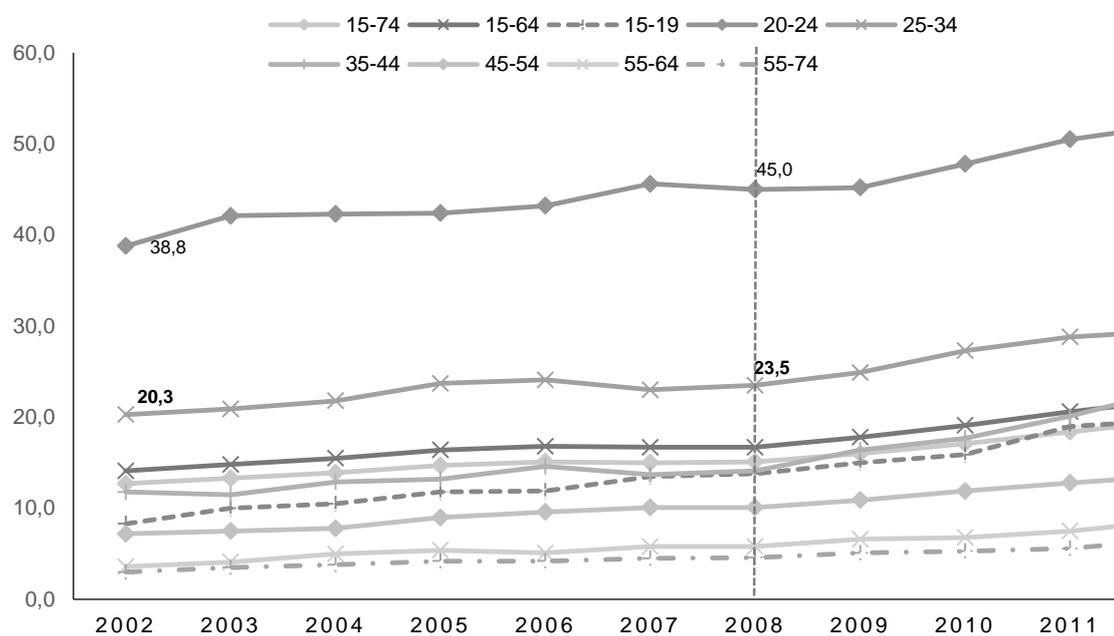
Source: Eurostat

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



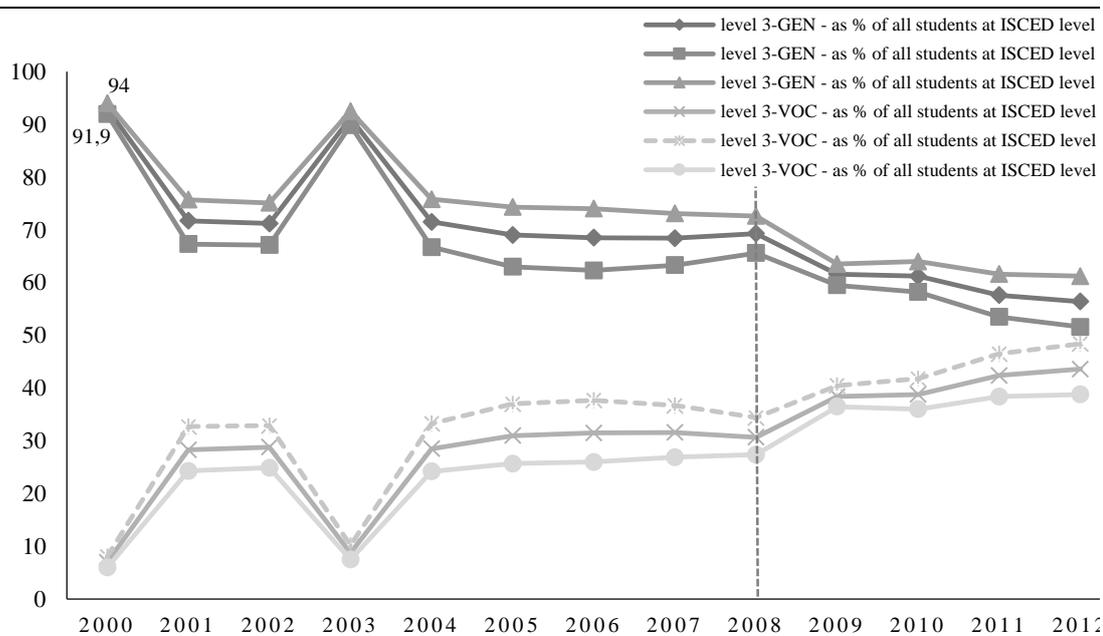
Source: Eurostat

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



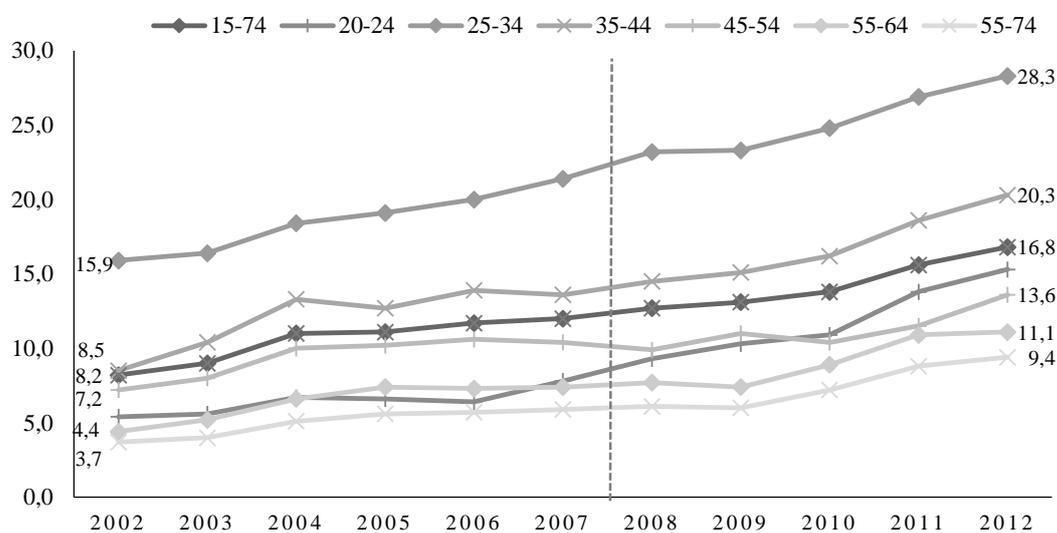
Source: Eurostat

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



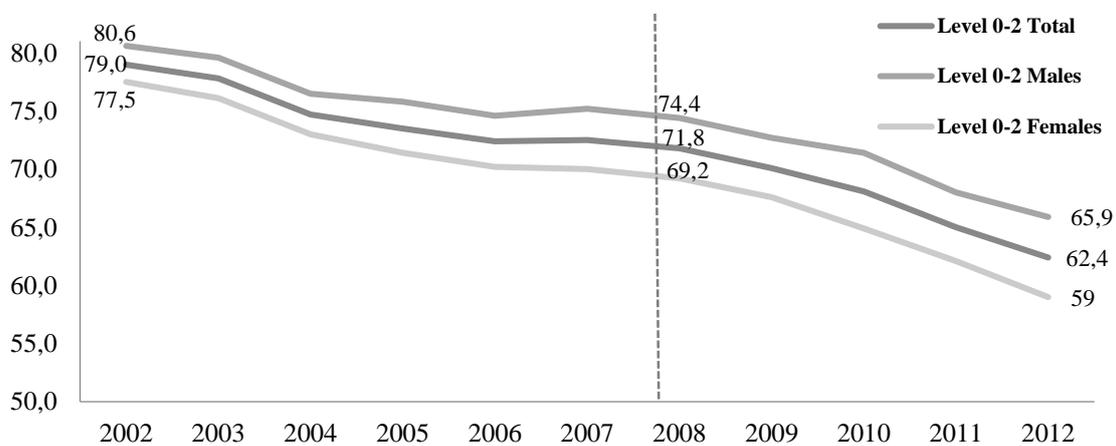
Source: Eurostat

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



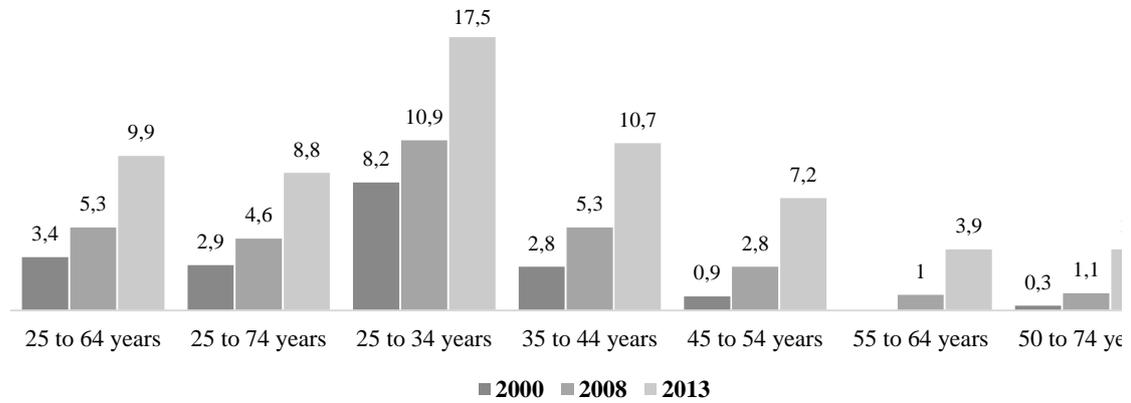
Source: Eurostat

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.

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National Studies

Country Report: Spain

UNIVERSITY, CITY (Spain)

Research team: Rafael Feito

Contents

List of tables and figures	78
A1. National context description	79
A2. Description of the educational system	86
Governance: regional autonomy within a centralized framework.....	89
89	
Student population.....	92
Teachers.....	94
Annexes.....	96
B. Crisis impacts in education	101
B1. Equity: Policies and achievements	104
Funding: autonomous resource management.....	104
Public and private expenditure in education.....	106
Special Educational Needs.....	106
Non-compulsory education.....	108
Vocational education.....	109
Higher education system.....	111
Annexes.....	113
B2. Final notes on equity and quality	118
References.....	120

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

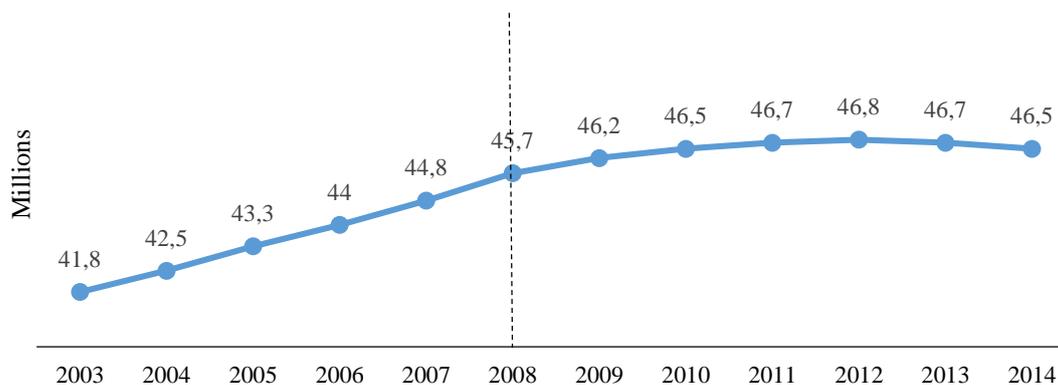
Figure B1.1 Early school leavers (%) 2000-2013
Figure B1.2 Youth unemployment rates, by ISCED, in Spain (2000-2013)
Figure B1.3 Public and private expenditure on education, percent of GDP (2000-2010)
Figure B1.4 Total students in pre-school, in Spain
Figure B1.5 Enrolment in upper secondary education 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.

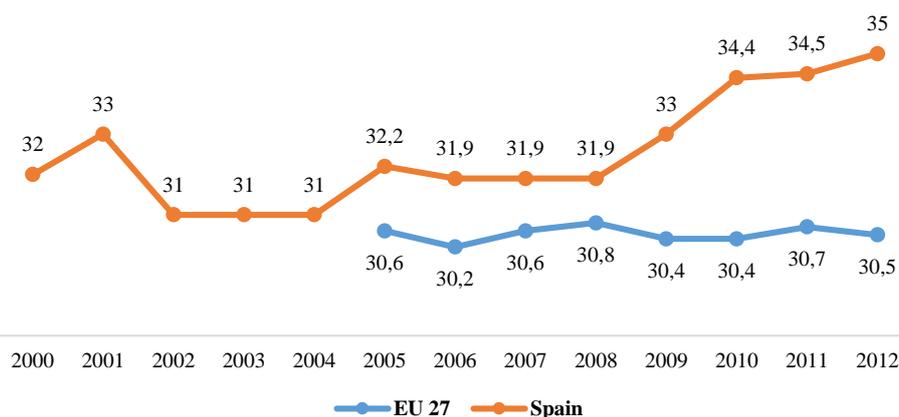
Earlier 2012, the parliament passed, thanks to the absolute majority of the right wing Popular Party, a decree slashing 7200 million euros in public health and 3700 in education. For education the public budget is 22% less than in the previous year. Luckily, remedial education rose to 170 million euros.

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.

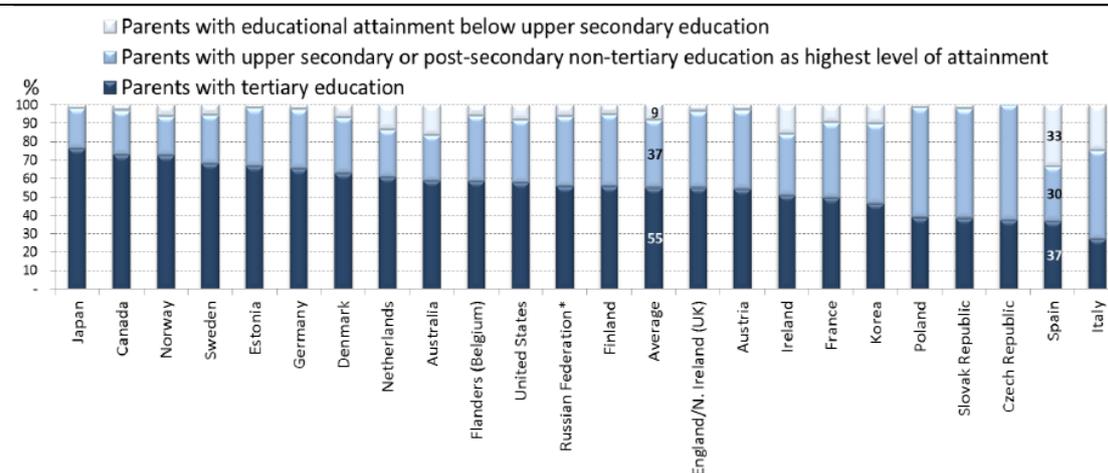
Table A1.2 Educational attainment of 25-64 year-olds (2012)

	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)



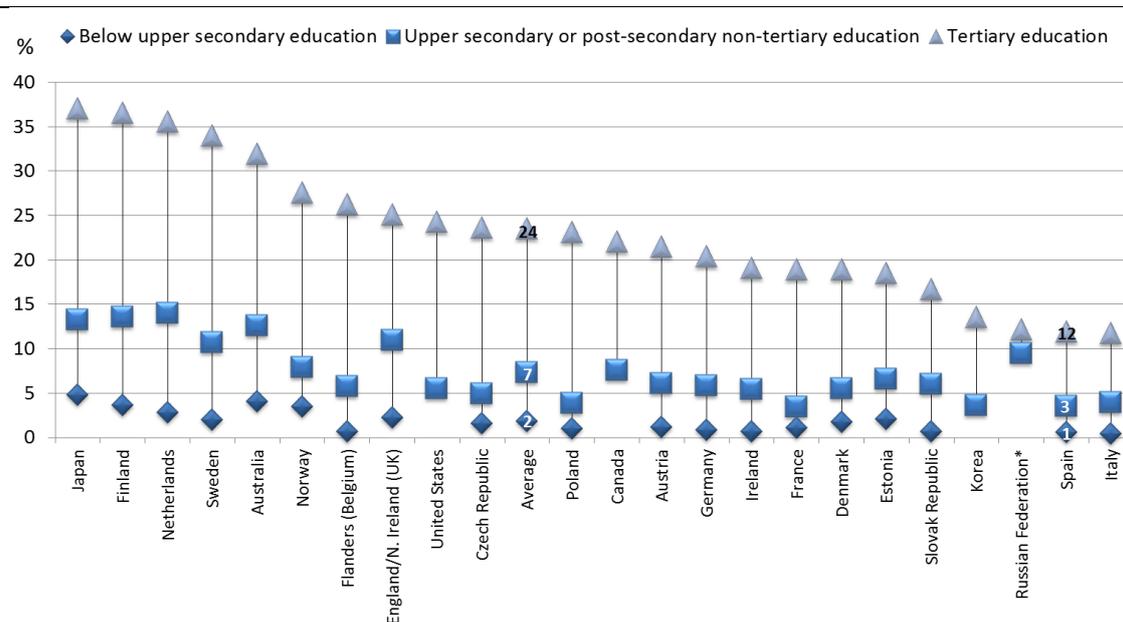
Source: OECD *Education at a Glance 2014*. Table A4.1a.

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

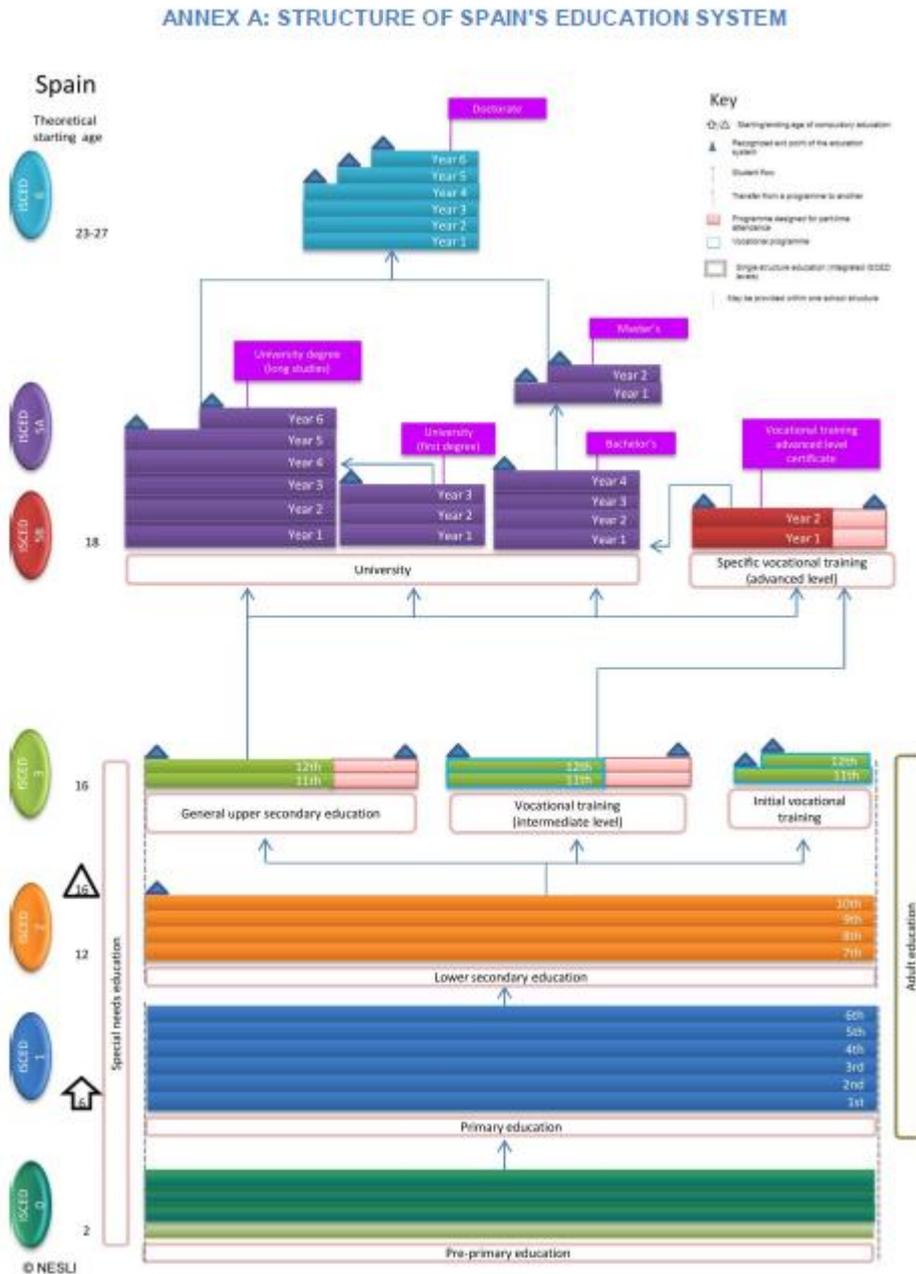
Meanwhile, around 10% of tertiary-educated adults in Spain perform at the highest level of proficiency in numeracy (Level 4/5). By comparison, the average across the 24 countries and sub-national regions that participated in the survey was 26% for this level of education.

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

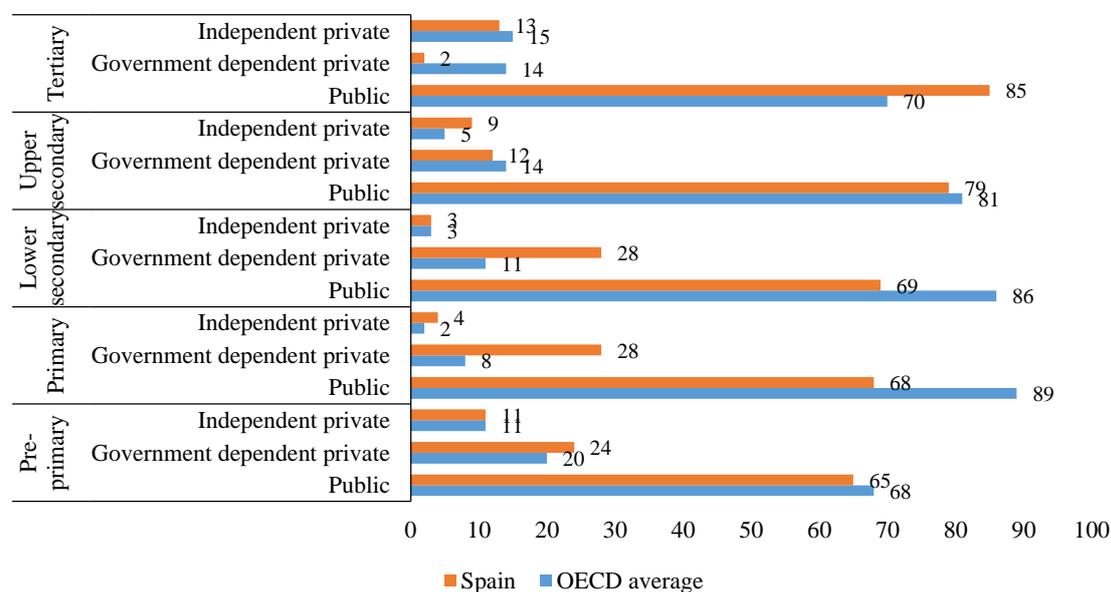
of them vote for selecting their representatives) and non-teaching staff. In vocational training schools, the councils might include representatives from labour institutions or employers' organizations.

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
CCAA	419 362	405 284	87 163	68 747	-32 494
MECD	2 903	2 786	1 151	961	-307
Total	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.

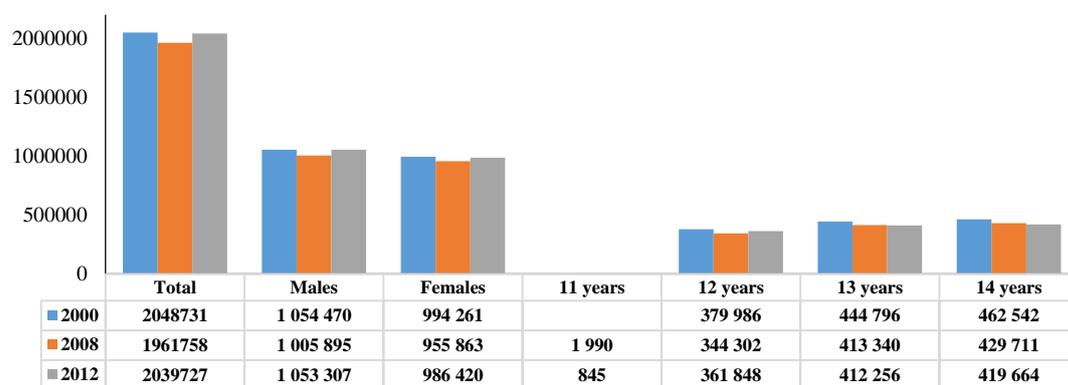
The Pisa researchers said Spain could improve its scores by giving schools greater autonomy over their curriculum. They also said low teacher morale could be prevented by linking positive professional appraisals to higher salaries.

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

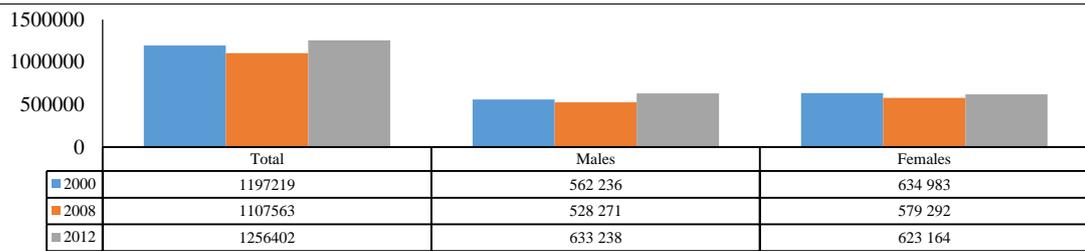
Figure A2.2 Evolution of the students number with lower secondary or second stage of basic education (level 2), by sex and age groups, in Spain (2000-2012)



	% 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

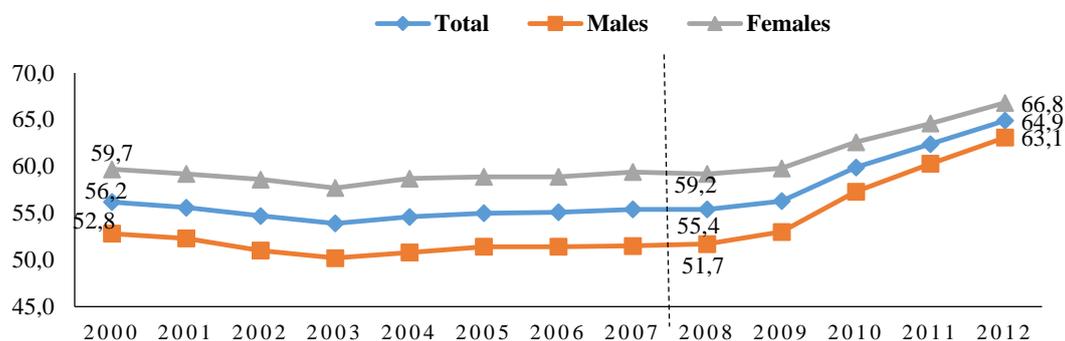
Figure A2.3 Evolution of the students number with upper secondary education (level 3), by sex and age groups, in Spain (2000-2012)



	% adult students	% students <20 years	14 years	15 to 19	20 to 24	25 to 29	30 to 34	35 to 39	+ 40
2000	19,2%	76,8%	6 611	912 736	176 097	20 820	12 275	7 959	13 241
2008	23,8%	75,8%	14 381	824 650	133 480	45 862	27 880	25 706	30 563
2012	29,8%	70,1%	;	880 900	182 249	60 965	43 529	38 203	49 657

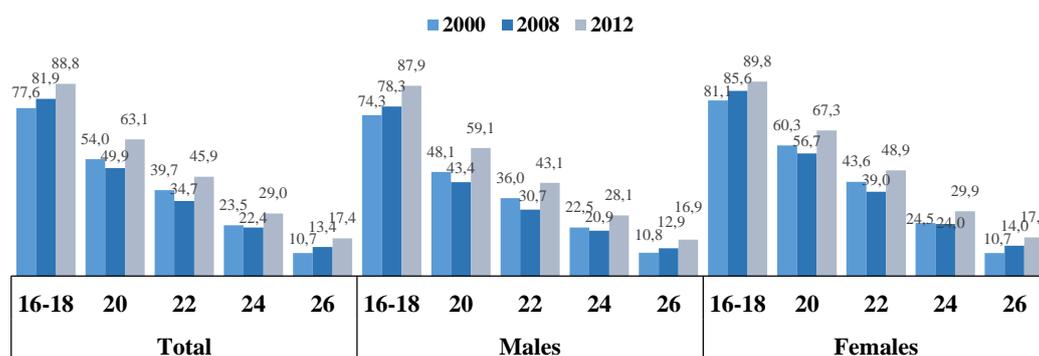
Source: Eurostat

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



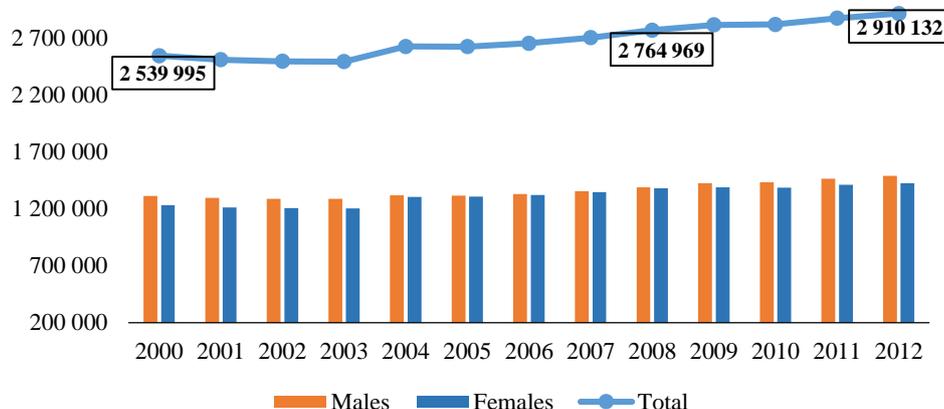
Source: Eurostat

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



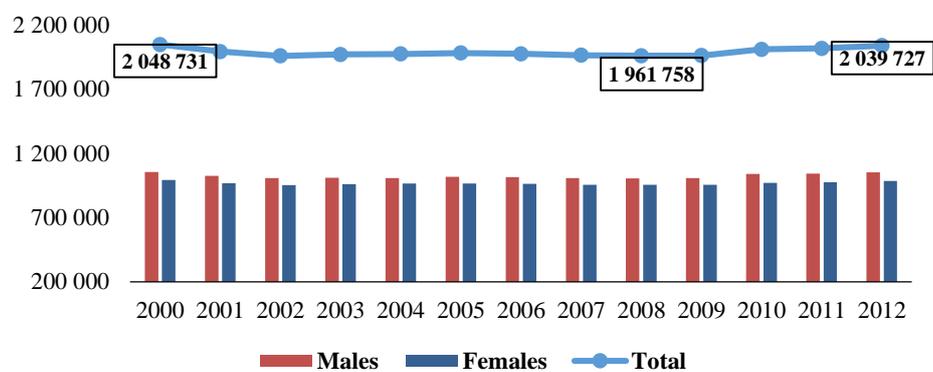
Source: Eurostat

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



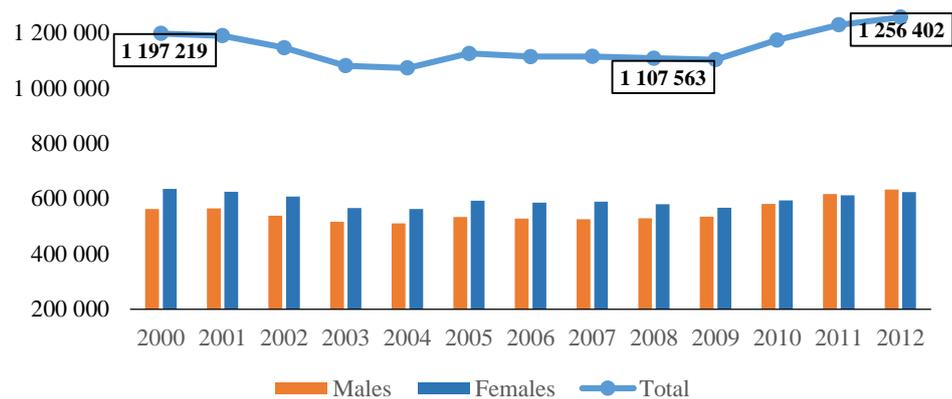
Source: Eurostat

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.

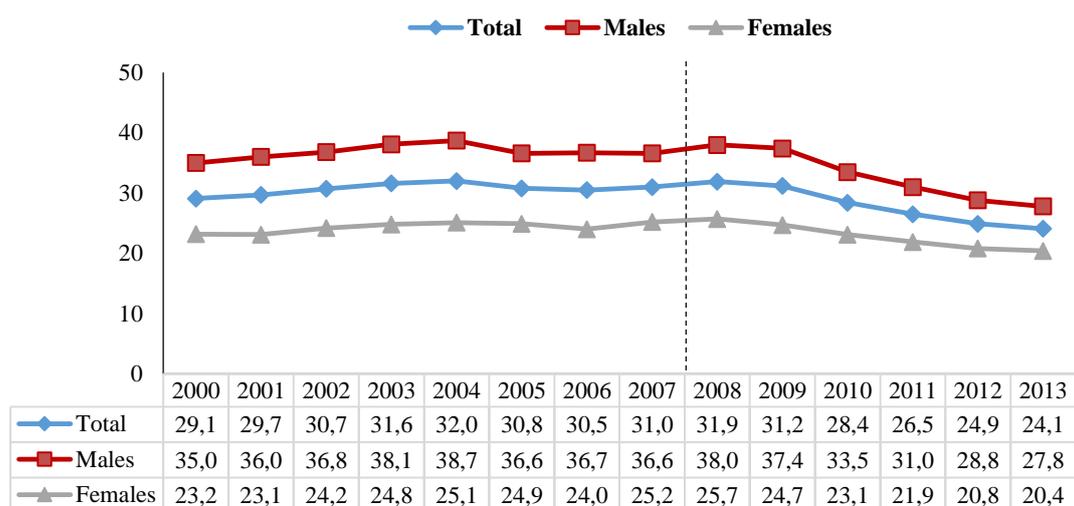
Table B1.2 Adults (25 to 64 years old) by level of qualification (%), 2010

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.

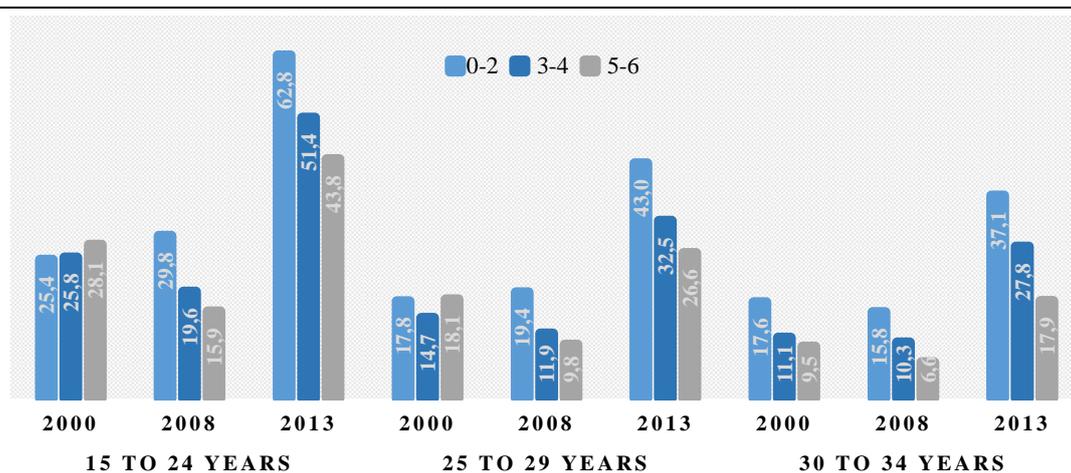
Figure B1.1 Early school leavers (%) 2000-2013



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</i>					
<i>Secondary</i>	64.3	61.9	431.8	0.7	4.4
<i>Vocational</i>					
<i>training</i>	92	86.2	1307.3	0.5	6.8

Source: Ministry of education

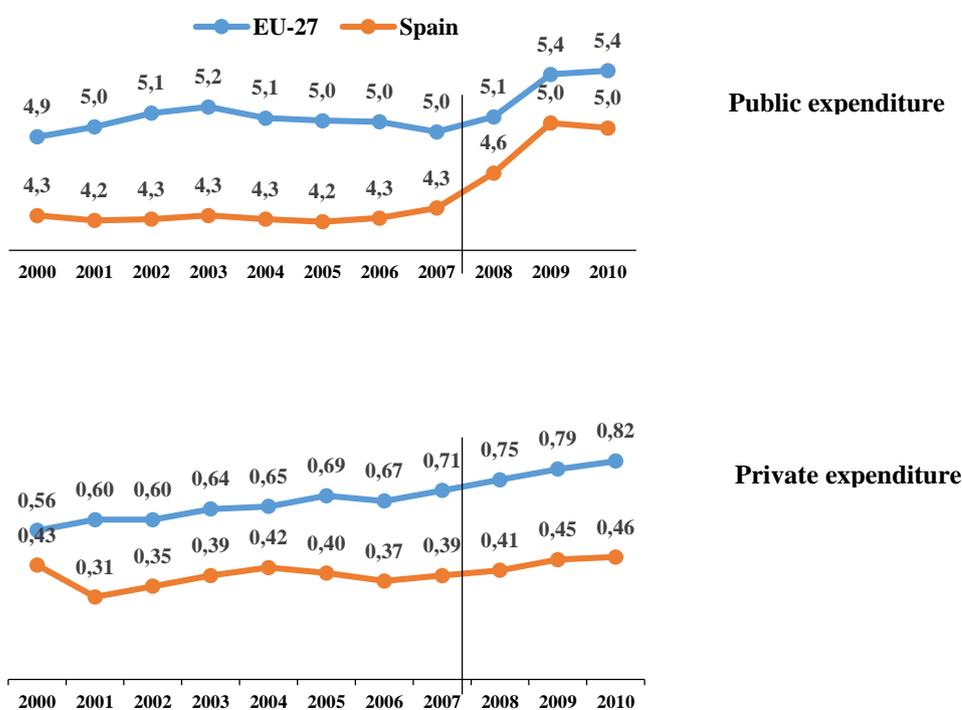
Together with France, Spain is the OECD country with the highest rate of retention. In fact, when they are fifteen years old, almost fifty percent of male student is

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.

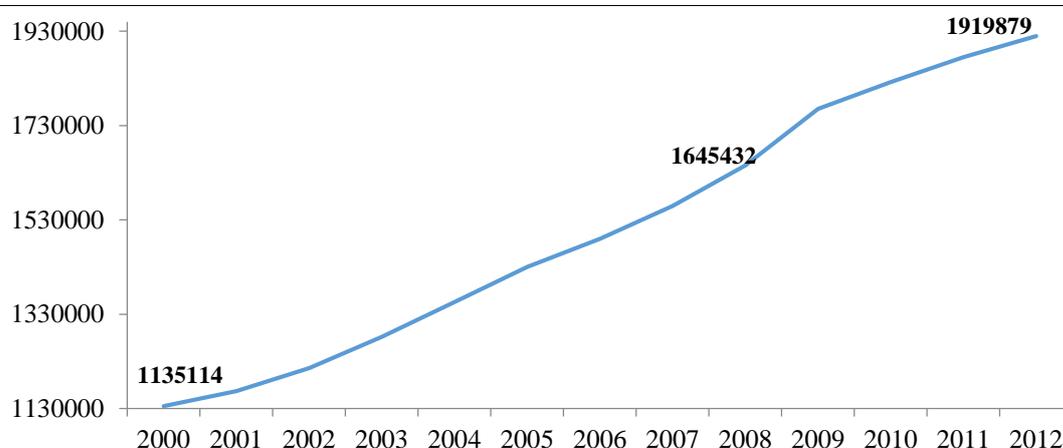
Concerning high ability students it is the responsibility of the Education Administrations to adopt the necessary measures to identify high ability and gifted students and assess their needs as early as possible. Moreover, they should introduce appropriate action plans to meet these needs. The government, 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)

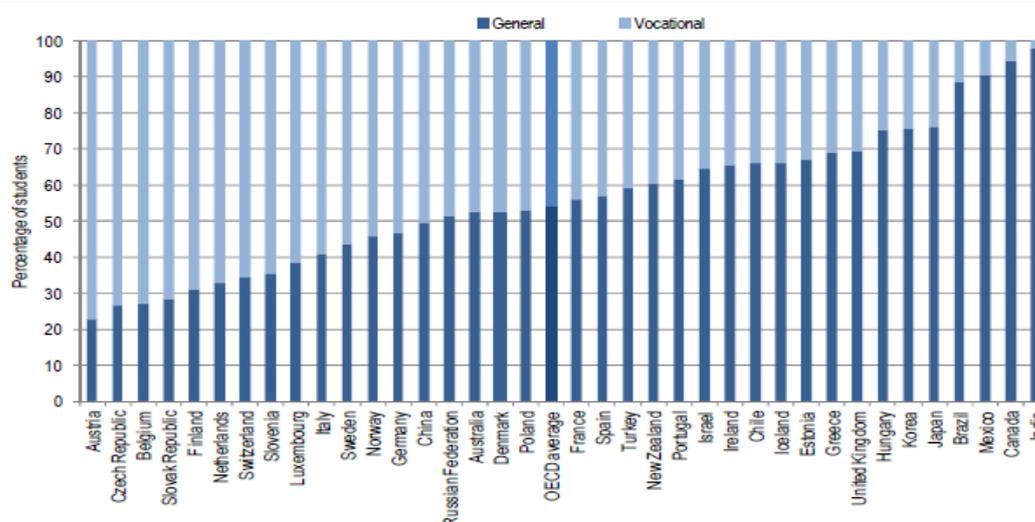


Source: Eurostat

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.

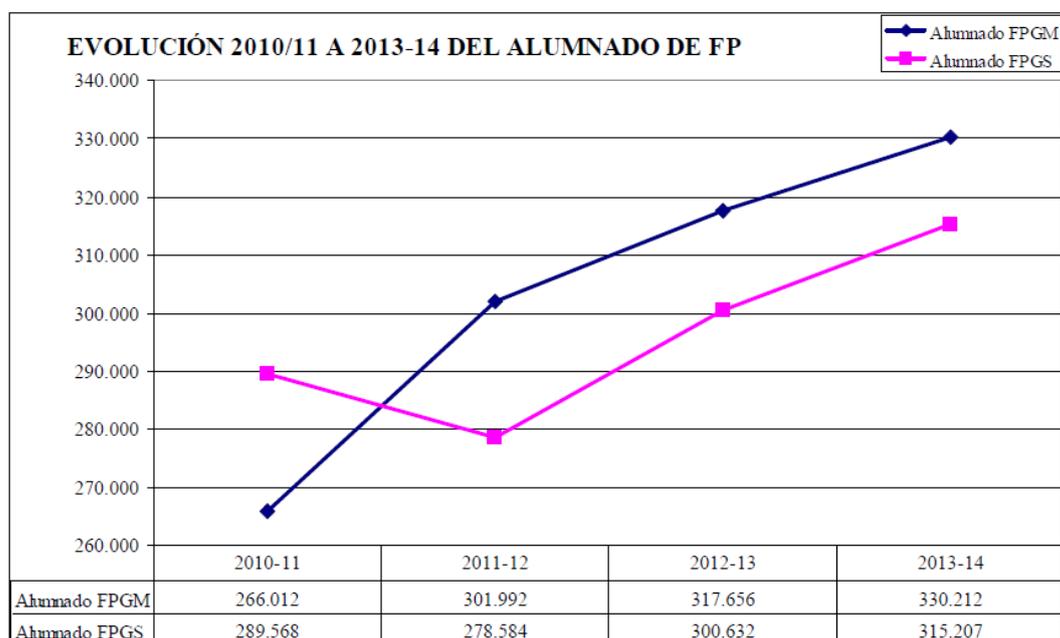
Table B1.4 Pupils enrolled in academic (bachillerato) and vocational (CFGM) upper secondary education, in Spain

	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.

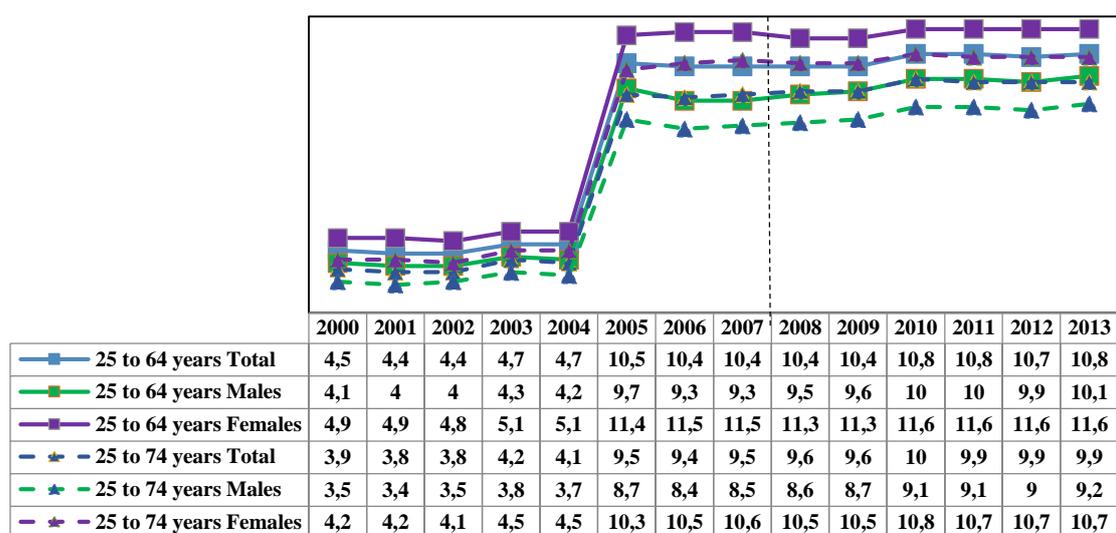
Taken from Rahona, Marta (2012) “Capital humano, abandono escolar y formación profesional de grado medio en España”, *Presupuesto y Gasto Público* 67/2012

Figure B1.6 Vocational education, 2010-2013.



Source: http://www.educocoo.es/images/doc/FP/20131007CCOO_Informe%20FPEstatal.pdf

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



Source: Eurostat

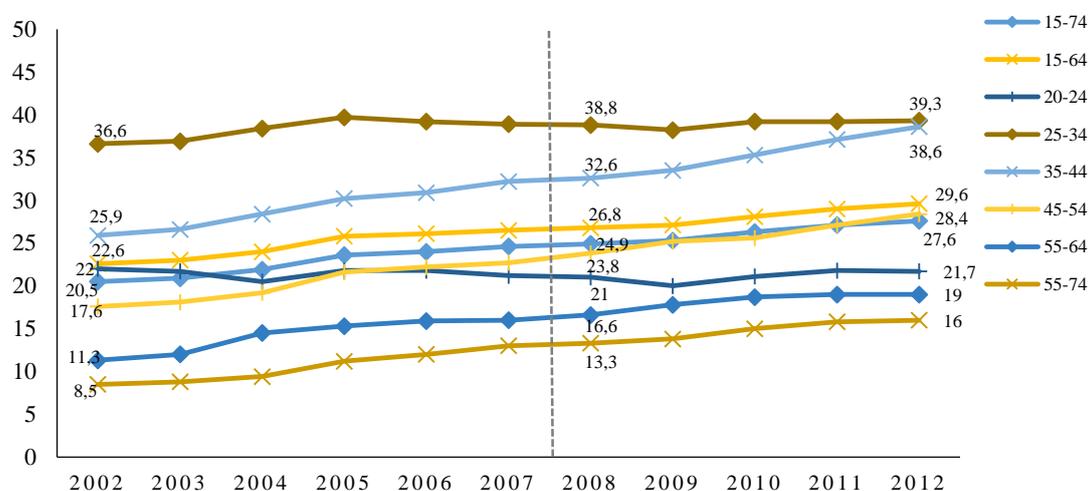
Higher education system in Spain

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.

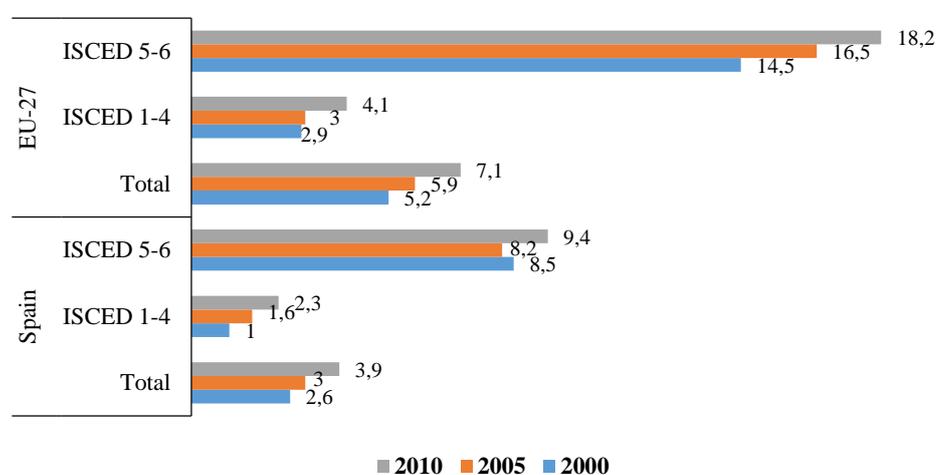
The cuts that hurt the students at university come at a time when the outlook for students that leave university is even worse.

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.

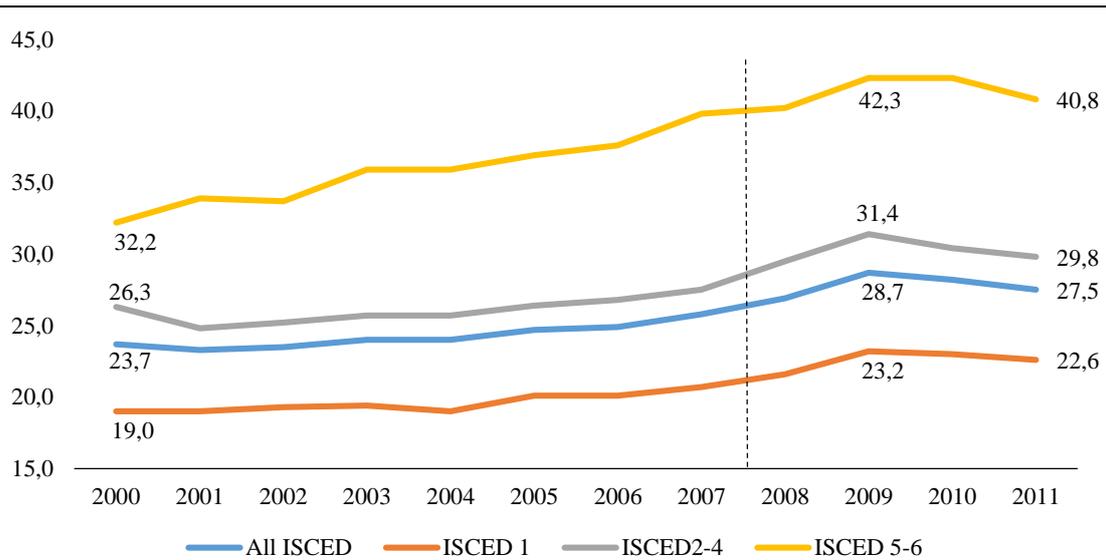
Annexes

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

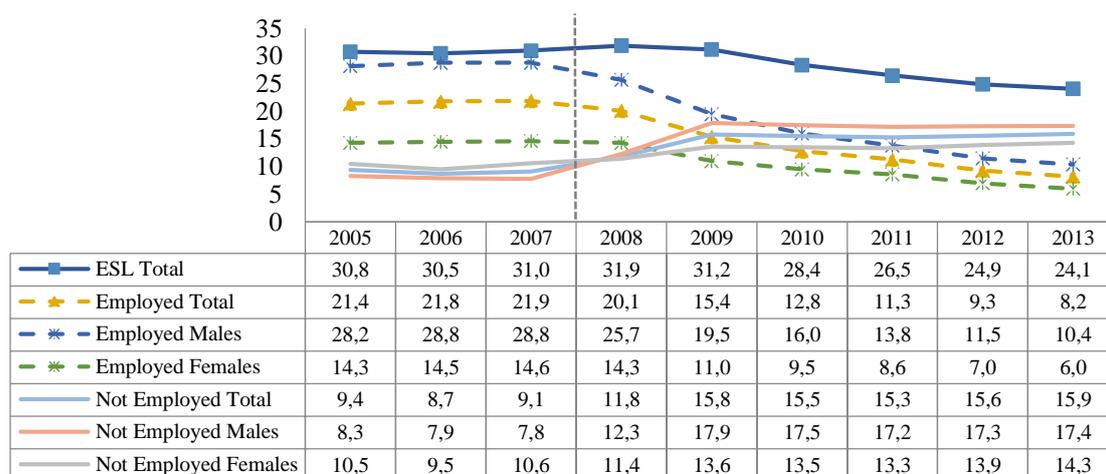
Table B1.7 - Pre-School Enrolment - Pre-primary education (level 0), % in relation to the same age total population and in relation to the same age total population

	% 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

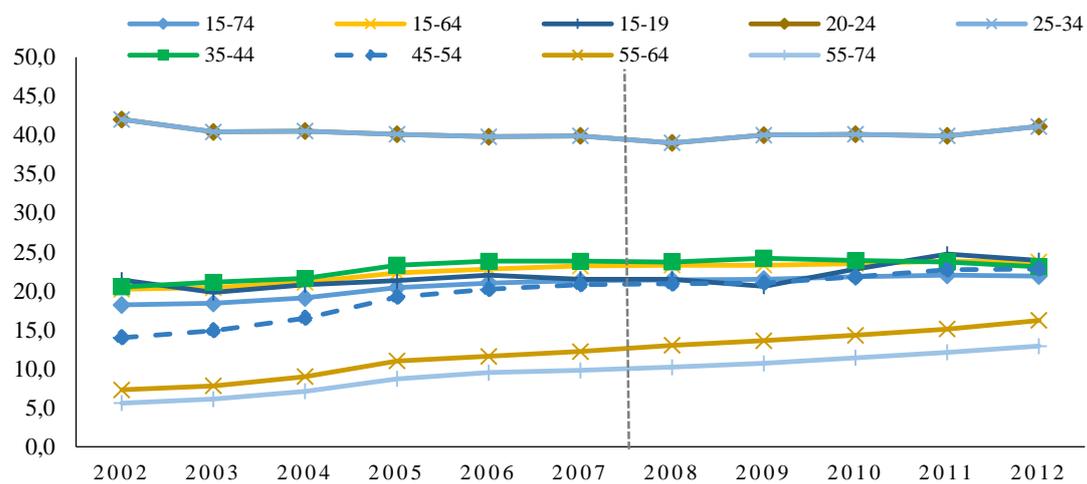
Source: Eurostat

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



Source: Eurostat

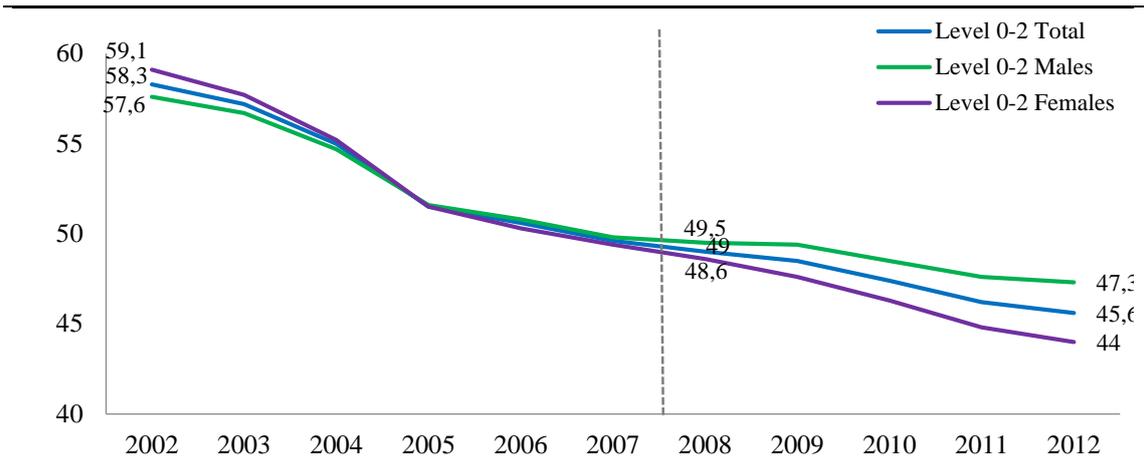
Figure B1.11 Percentage of total population aged between 15 and 74 with Upper Secondary and Post-Secondary attainment, in Spain



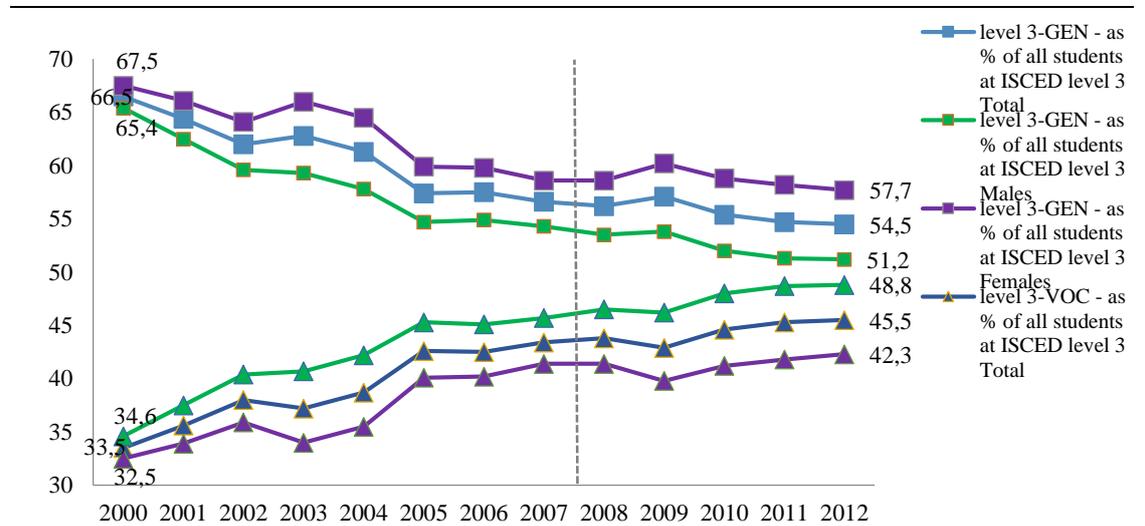
Source: Eurostat

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

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



Source: Eurostat



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

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National Studies

Country Report: Italy

Università Cattolica del Sacro cuore, Milan (Italy)

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Department of Sociology

Contents

LIST OF TABLES AND FIGURES	123
SECTION A: BACKGROUND	125
A1. NATIONAL CONTEXT DESCRIPTION	125
Annexes	130
A2. EDUCATION SYSTEM CHARACTERIZATION	133
Annexes	140
A3. PROCESSES AND MECHANISMS OF MONITORING AND EVALUATING THE EDUCATIONAL SYSTEM	145
Annexes	152
SECTION B: CRISIS IMPACTS IN EDUCATION	153
B1. EQUITY: POLICIES AND ACHIEVEMENTS.....	153
B1.1 Problems in the access to the educational system	154
B1.2 Between access and success. Analysing the participation of specific groups	157
B1.3 Contrasting failure and promoting success in education	160
B1.4 Improving competences of adolescents and adult population	166
ANNEXES.....	169
B2. FINAL NOTES ON EQUITY AND QUALITY: ORIENTATION AND PROCESSES	178
SUMMARY AND CONCLUSION.....	186
REFERENCES.....	187

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%) (FigureA1. 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 A1.2), 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 A1. 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 (Campione, 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

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

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

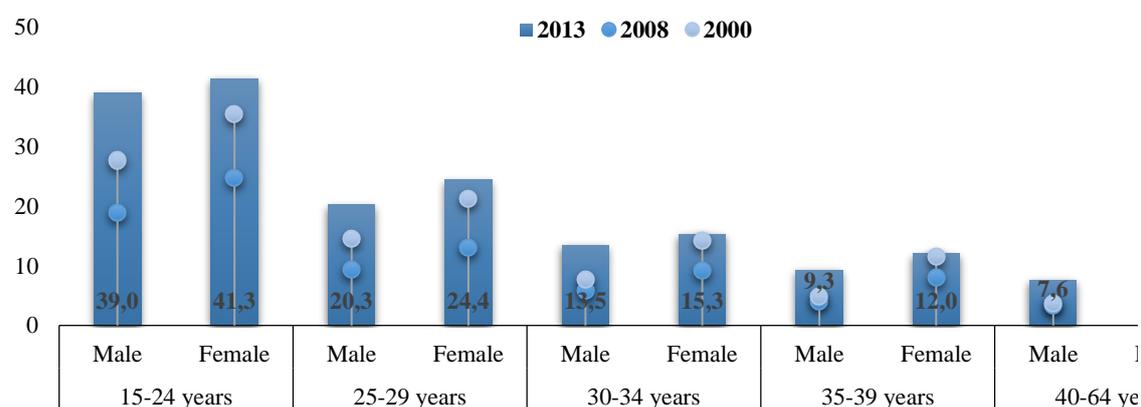
Crisis effects. According to several authors (i.e. Landri, 2009), so far the so called “neo-liberal turn” concerning welfare policies (including education policy) did not benefit neither in terms of protection and jobs creation nor in term of equality. On the contrary one can observe in Italy new kinds 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.

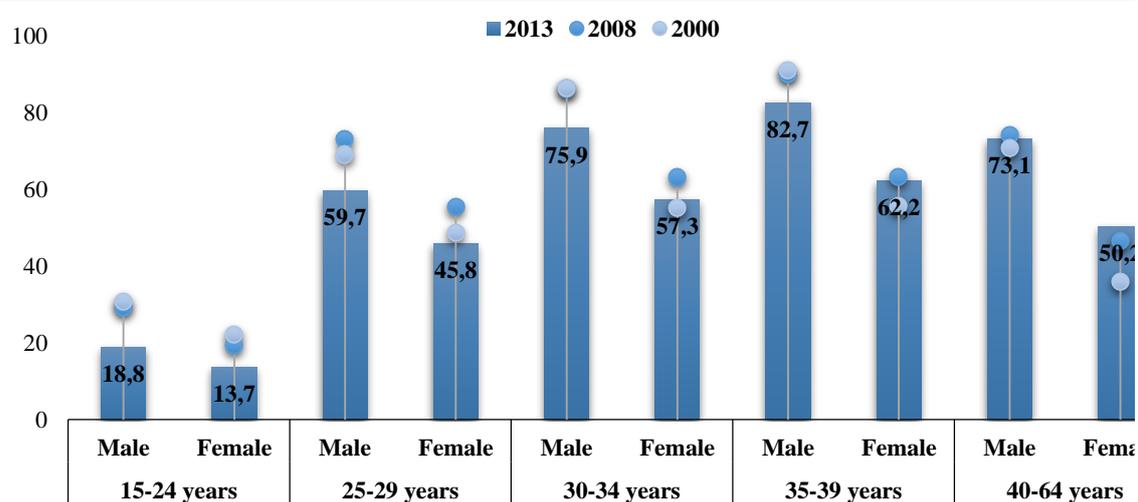
1. Annexes

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



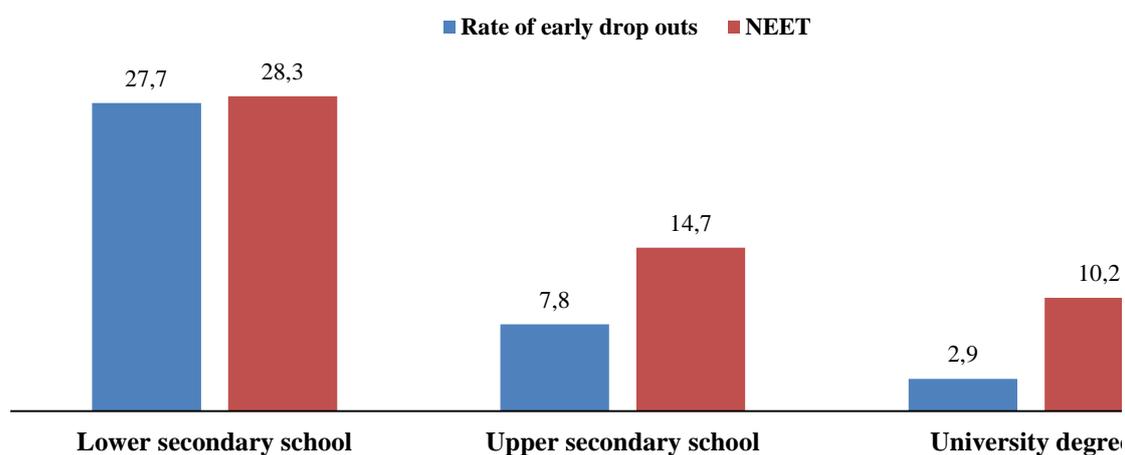
Source: Eurostat

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



Source: Eurostat

Figure A1.3 Rates of early drop outs and NEET by parents' level of education, 2011



Source: BES Report 2013, national survey on labour forces

Table 1. Gini Coefficient, in UE27 and Italy (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
Italy	29	29	:	:	33,2	32,8	32,1	32,2	31,0	31,5	31,2	31,9	32,1

Source: Eurostat

Note: : = Not available

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

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU27	:	:	:	:	:	16,4	16,5	16,5	16,4	16,3	16,4	16,9	17,1
Italy	18	19	:	:	19,1	18,9	19,6	19,8	18,7	18,4	18,2	19,6	19,8

Source: Eurostat

Note: : = Not available

Table 3. Children at risk of poverty rate in Italy

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU27	:	:	:	:	:	19,6	19,7	19,3	19,9	19,5	20,1	20,2	21
Italy	25	25	:	:	24,6	23,3	24,5	25,4	24,6	24	24,3	25,9	26,5

Source: Eurostat

Note: : = Not available

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 A2. 1). According to the available data (Table A2. 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 A2.3). 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 A2. 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 A2.5).

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 A2. 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 A2.2). 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 A2.3).

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-tehnology...), necessary for being competitive at international level (Isfol, 2013, p.14).

2. Annexes

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

Pre-primary	Public	Private	Total	% private schools
North-West	3.261	2.133	5.394	39,5
North-East	2.422	1.982	4.404	45,0
Center	3.229	976	4.205	23,2
South	4.578	2.245	6.823	32,9
Islands	2.336	939	3.275	28,7
<i>Total pre-primary</i>	<i>15.826</i>	<i>8.275</i>	<i>24.101</i>	<i>34,3</i>
Primary	Public	Private	Total	% private schools
North-West	4.005	375	4.380	8,6
North-East	3.264	209	3.473	6,0
Center	2.799	334	3.133	10,7
South	3.974	461	4.435	10,4
Islands	1.964	156	2.120	7,4
<i>Total primary</i>	<i>16.006</i>	<i>1.535</i>	<i>17.541</i>	<i>8,8</i>
Lower Secondary	Public	Private	Total	% private schools
North-West	1.726	276	2.002	13,8
North-East	1.289	145	1.434	10,1
Center	1.214	148	1.362	10,9
South	2.016	83	2.099	4,0
Islands	988	46	1.034	4,4
<i>Total lower secondary</i>	<i>7.233</i>	<i>698</i>	<i>7.931</i>	<i>8,8</i>
Upper Secondary	Public	Private	Total	% private schools
North-West	1.121	452	1.573	28,7
North-East	897	204	1.101	18,5
Center	1.018	279	1.297	21,5
South	1.638	459	2.097	21,9
Islands	746	244	990	24,6
<i>Total upper secondary</i>	<i>5.420</i>	<i>1.638</i>	<i>7.058</i>	<i>23,2</i>
All levels total	44.485	12.146	56.631	21,4

Source: Istat

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

	Var. % 2010-2013	
	public school	private school
Pre-primary	-1,4	0,5
Primary	-2,8	1,9
Lower secondary	2,7	4,7
Upper secondary	2,0	10,0
Total	-0,9	2,1

Source: Istat-Miur

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

	2000	2001	2002	2003	2004	2005
Pre-primary education	120.896	123.38	125.52	134.23	132.47	103.09
Primary education	258.827	262.67	263.42	256.65	260.76	248.34
Lower secondary education	174.630	182.99	184.08	178.87	179.19	170.26
Upper secondary education	246.667	258.17	256.58	249.30	237.82	215.56
First and second stage of tertiary education	75.081	80.775	80.313	87.215	91.978	94.371
Total	876.101	908.00	909.92	906.27	902.24	831.63
	2006	2007	2008	2009	2010	2011
Pre-primary education	100.508	101.30	103.60	105.11	99.108	101.54
Primary education	249.487	254.73	254.43	250.76	237.44	230.36
Lower secondary education	168.781	180.24	189.12	186.67	162.36	160.20
Upper secondary education	218.992	227.10	229.79	228.19	224.97	212.90
First and second stage of tertiary education	99.595	104.42	103.28	110.31	106.11	103.46
Total	837.363	867.81	880.24	881.06	830.01	808.48

Source: Eurostat

Table A2.4 Teachers per age groups and levels

Levels	Age groups	%
ISCED 1	<30	0.5
	30-39	16.6
	40-49	37.9
	>50	45.0
ISCED 2-3	<30	0.5
	30-39	9.5
	40-49	30.8
	>50	59.3

Source: Eurydice

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

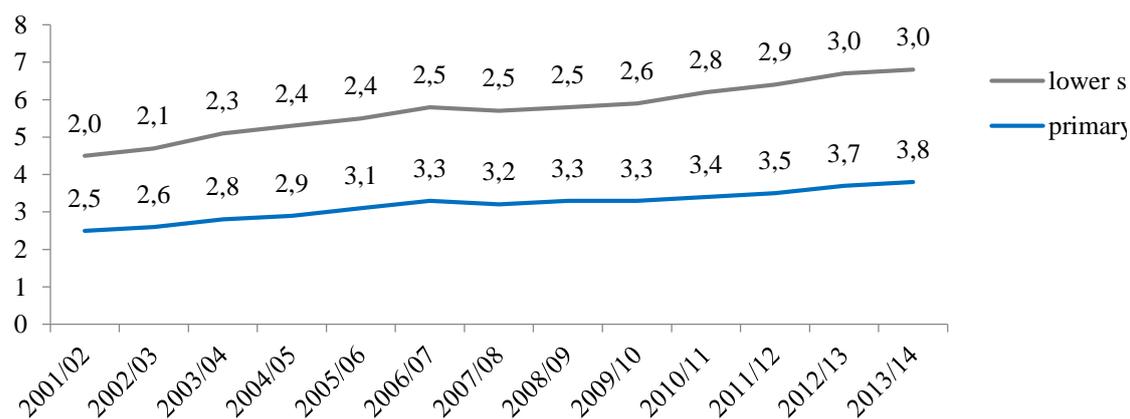
	Students	%	whose female %	whose foreigners	Var % 2000-2012	Var % 2012/2011
pre primary	1.694.912	18,9	48,1	9,2	7,7	0,4
primary	2.818.734	31,5	48,4	9,5	-0,6	-1,5
lower secondary	1.792.379	20,0	47,9	9,3	-1,2	-1,7
upper secondary	2.655.134	29,6	48,8	6,2	2,5	-6,6
Total	8.961.159	100,0	48,4	8,4	1,7	-2,8

Source: Istat-Miur

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

	Foreign students	%	Var. % 2010/12
pre primary	156.701	20,7	0,2
primary	268.755	35,5	9,9
lower secondary	166.043	22,0	10,5
upper secondary	164.524	21,8	14,4
Total	756.023	100,0	12,1

Source: Istat-Miur

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

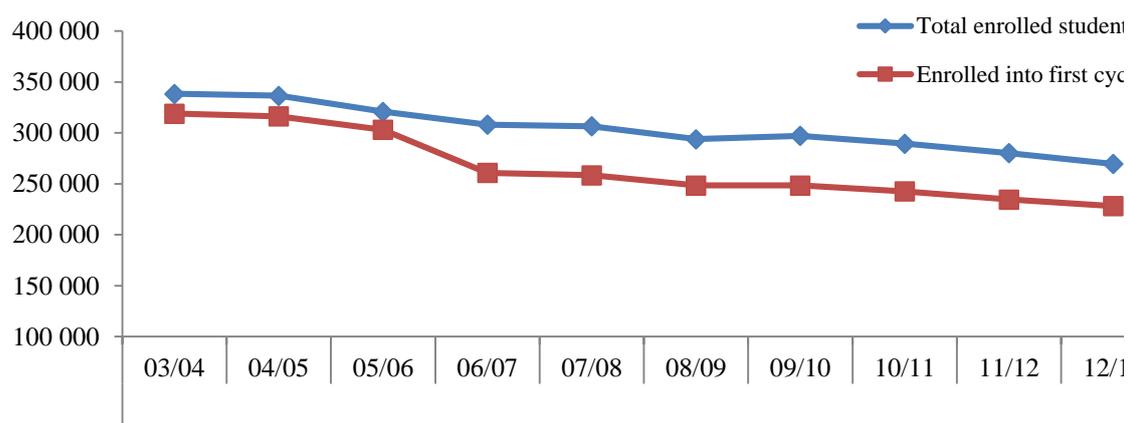
Source: Istat-Miur

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

	dependent for moving	dependent for going to the bathroom	dependent for eating
primary school			
North	10,6	15,4	7,7
Center	13,4	18,1	9,8
South	16,7	25,4	11,5
Italy	13,3	19,5	9,5
secondary school			
North	8,1	9,0	4,6
Center	10,9	12,0	5,7
South	14,8	18,6	7,9
Italy	11,0	12,9	6,0

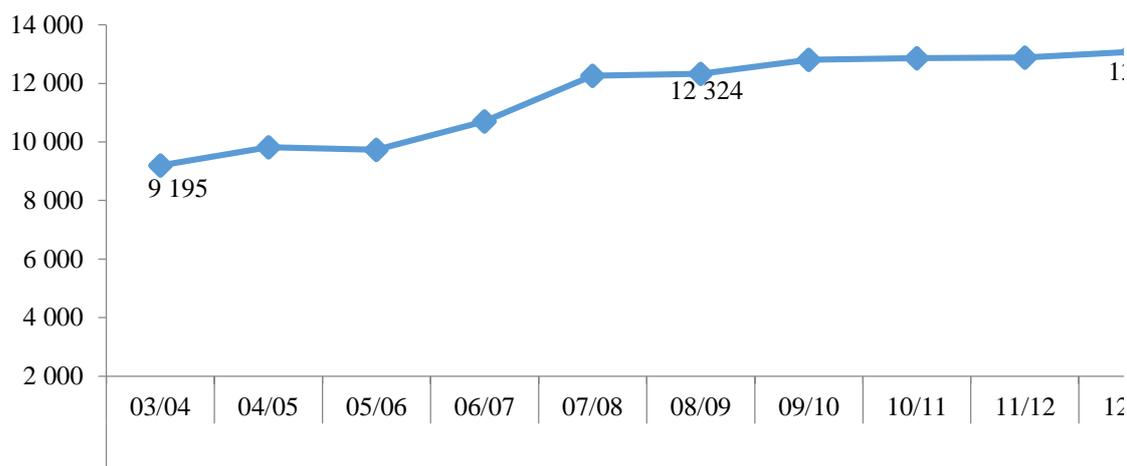
Source: Istat-Miur

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



Source: MIUR

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



Source: Istat-Miur

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

General overview. The demand of evaluation of the educational system in Italy increased over the last ten years due to four factors (Fondazione Giovanni Agnelli, 2014):

- 1) The disappointing results collected by OCSE PISA 2003 about Italian students compared to international data;
- 2) The increasing autonomy of schools that required a wider control from central authorities;
- 3) 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;
- 4) Effects of Internet Culture: families require more information and data on the quality of schools in order to make the correct school choice.

Despite the arising of this new need, Italy, compared to other OECD countries, is characterized by underdevelopment in terms of monitoring and evaluation practices of the educational system. As discussed more in details in the following paragraphs, these practices are few and often unsuitable to the Italian context. Especially external methods of evaluation are not adequately developed. The construction of a national system of evaluation is still coping with a set of obstacles, which the main seems to be the opposition by teachers. This resistance mainly depends on the absence of a culture of evaluation in the public sector: teachers, for example, are not trained for it during their education pathways. In addition, since methodologies, instruments and aims of the evaluation process are not clear, they suspect these practices would lead to personal penalties

and resources reduction. The absence of a clear general framework providing a theory of evaluation and empirical practices causes confusion and mistrust.

As mentioned before, while the external evaluation is almost absent, self-evaluation is constantly encouraged, but without comparison it becomes self-referent (Fondazione Giovanni Agnelli, 2014). Exams in Italy, for example, are not comparable at a national level, apart from the Invalsi tests at the end of lower secondary education, but these tests are submitted to students with some methodological limits.

International Tests. The last PISA report has been issued in 2012 and reported a worse performance of Italy compared with the average of OCSE 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. The gender divide also characterizes Italians performance: boys outperform girls in mathematics by an average of 18 point, a larger gap than observed across OECD countries (11 points). This gap is stable since 2003. On the contrary girls outperform boys in reading by 39 points average, similar to the gap recorded among OECD countries (38), but while across OECD countries this gap has widened by 6 points since 2000, in Italy it remained stable.

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 surveys³⁰. It reports also the main features of Italy in terms of student characteristics (especially familiar background) and learning skills, educational practices and schools structure.

But 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, policy makers often interpret results according to their ideological beliefs. Secondly, 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. Finally, the most significant point is that Italian

³⁰ 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.

political representatives systematically ignore the results of these surveys to reform the scholastic system (Gentile e Rubino, 2011, p.197)

The national system of learning performance assessment. Since 1999 INVALSI is the Ministerial agency charged of three main tasks:

- 1) evaluation of efficacy and efficiency of the national educational system;
- 2) progressive improvement of the quality of the educational system in order to provide an equal distribution through the territory;
- 3) 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.

INVALSI also has the relevant scope of providing each school with information on their students' performance in order to promote self-evaluation on a comparative basis. INVALSI national tests were introduced for the first time in 2002 on a voluntary basis, later modified several times and now are compulsory in given grades; they are inspired to PISA and IEA tests, but they currently differ for the following characteristics:

- 1) PIRLS and TIMMS tests follow a sampling criteria, while Invalsi tests now are universal: the whole population into the grades considered by the survey is expected to take them

(See Table 1 for the participation in 2014 to Invalsi Tests) (in the past Invalsi tests have been submitted only to sampled classes).

- 2) PIRLS tests include science, reading and mathematics, while current Invalsi tests include only reading and mathematics
- 3) PIRLS and TIMMS tests involve different grades compared to Invalsi tests as table A3.2 shows.

Nevertheless similarities between TIMMS and INVALSI tests are considerable, concerning both the fields evaluated and the processes investigated. On the contrary more differences are identifiable between PISA and INVALSI tests in mathematics, since PISA survey conceives mathematics as an instrument to analysing, interpreting and representing situations occurring in the real world, while mathematics processes taken into consideration by INVALSI tests are more complex (Invalsi, 2011, pp. 219-226). All these tests show coherent results among them. This coherence has been considered a proof of the accountability of Invalsi procedures. In the last years, Invalsi has considerably shortened the time of providing schools with the collected results, achieving to disseminate a first report in the beginning of the following scholastic year (September): 21-60 days occur between the data collection and the results dissemination among schools (compared to 18 months for the international surveys mentioned above) (Invalsi, 2014, pag.1). This first report is based on a data analysis conducted on a sample, not on the whole population. The availability of this data by September gives schools the chance to reflect with more information on their educational planning for the forthcoming scholastic year.

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.

Other sources for monitoring education. Besides the INVALSI, the INDIRE National Institute of Research (*Istituto Nazionale di Documentazione*), the oldest research body of the Ministry of Education, is also operating since 1925. It assists schools in their processes of improvement. Alongside with INVALSI, it is part of the National System of Evaluation (SNV). Through qualitative and quantitative surveys, databases and research reports, INDIRE monitors the transformations of curriculum of technical and professional education and the transition from

school to work. By the same MIUR there is a statistical unit, which is in charge of a set of surveys and research report yearly issued. In addition, it produces some reports called “focus” that concentrates their analysis on specific topics³¹. All these reports are based on the yearly census of the “school units” and their population, using detection questionnaires filled out by the administrative secretary of each institute. The main point of weakness of the information system of MIUR is the lack of a national register of pupils in age of compulsory education.

MIUR instead manages the National Registry of University Students providing open access to data on a basis of single academic unit. Data available concern enrolled and graduated students per age, gender, citizenship, territory, courses, faculties, typology of diploma. Open access is guaranteed for data since 2003/04 to today. Another source provides data on the Musical and Artistic High Education (AFAM) collected since 1999. Then MIUR manages the *Diritto allo Studio* (Right to Study) database where data concerning studentships and fellowships issued for tertiary or higher education since 1999 can be found. OFF.F is another database managed by MIUR in cooperation with CINECA³²: it provides data on university courses.

Autonomy. Despite the Law n. 59 /1997 which ruled the school autonomy, comparing to OECD countries in Italy the public schools have little autonomy over matters such as hiring teachers, dismissing teachers, formulating the school budget and deciding its allocation within the school. 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. 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. This is a countertrend compared to many other OECD countries: for example, Germany, Ireland and France do not allow schools to receive and use private funding.

Italian schools have no autonomy at all in the human resources field. Regarding the teaching staff, schools are not in charge of deciding about “hiring or firing”, they can only

³¹ Systematic issues are: Annals of Public Education, Preview of main data on public schools, Foreign Students in the Italian Educational System, Scholastic Integration of Students with disabilities, Adult education monitoring. Special foci are, for example: report on the ICT provisions, early school leaving.

³² Cineca is a no-profit inter-university union born in 1969 at the service of the national university system with the aim of promoting advanced system of information in favour of the scientific and technological research, both public and private.

establish, within a limited autonomy, disciplinary measures. As in the majority of OECD countries, also in Italy teachers are not in charge and not even involved in defining the minimum learning skills previewed by the compulsory curriculum³³. 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.

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.

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. Italy is also characterized by the absence of evaluation of teachers (EurydiceItalia, 2009).

Teachers' recruitment and professionalization. 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:

³³ By compulsory curriculum the Eurydice Report quoted means the wide learning areas and their general goals, not the contents of each specific subject.

- Pre-primary and primary school teachers are expected to obtain a five year degree (compared to the previous four years)
- Secondary school teachers are compelled to obtain a Master Degree and to attend a professional internship (*TFA, Tirocinio Formativo Attivo*), including teaching of science of education and 475 hours to work in a school under the supervision of a tutor. The internship terminates with a report and it is followed by the exam of qualification to teaching.

According to the European patterns, teachers' education is divided in general and professional component (Eurydice, 2013)³⁴. 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. As the majority of Southern European countries 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.

In conclusion, 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, due to:

- A not-compelling duty of self-improvement in profession;

³⁴ According to the combination of these two parts, we can have *concurrent model*, when the two components are provided at the same time, or *consecutive model*, when the professional component is provided after the general one.

- A low annual budget devoted by the Ministry of Education on the professional development of teachers and, by consequence, the professionals who want to acquire new skills have to do it mainly at their own expense.
- Costs of the courses are more than the teachers can afford (being the salary below the Eu countries average). In Italy the teacher's salary in fact is from 0.60 (primary level) to 0.69 (upper level) ratio of a full-time adult worker with tertiary education (OECD 2014, p. 11).

3. Annexes

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

Grades	Class	Students
2nd grade primary	29.719	568.251
5th grade primary	29.685	561.183
3st grade lower secondary	29.462	497.639
2nd grade upper secondary	26.540	560.672

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

PIRLS	TIMMS	INVALSI
4 TH grade	5 th grade	2 nd grade of primary school
	8 th grade	5 th grade of primary school
		3 st grade of lower sec. school
		2 nd grade of upper sec. school

Source: Istat-Miur

Section B: Crisis impacts in education

B1. Equity: Policies and achievements

Premise. The issue of equality in the educational system is relevant in Italy since the second half of the 20th century due to a progressive increase of the diversification among students at an economic, social and cultural level. This situation leads to the problem of how social identities can affect the chances of access, admission, durability and success in educational paths (Cesareo, 1972).

At the end of 1947, under the solicitation of the Universal Declaration of Human Rights, the Constitution of the Italian Republic declared in section 34 that “school is for everybody. The basic education, which lasts at least eight years, is compulsory and free. The most talented and deserving ones have the right to reach the highest levels of education, even those without financial resources”. During the 20th century the demand for social equality increased, even due to the fact that the social scale system could have been called into question by the educational system itself by its way to consider and treat all of its members equally.

Since the end of the 1960s, however, even in Italy it is clear that education can no more be considered as a vehicle of social justice nor as a means to solve or at least diminish the phenomenon of social inequality. The individuals who are lower in status have less possibilities to achieve higher education or to improve their social and professional condition: the more selective the schools become the more they are attended by students with a high social status. Although the studies on social mobility point out that education can weaken the influence of social background on occupational address, in a situation of educational qualification being equal, the ones with a higher social status can achieve better work positions (Ballarino, Cobalti, 2003). Analysis highlight therefore that each society is affected by factors that can prevent the economically disadvantaged youth from succeeding in school, no matter how intellectually gifted they are (Cesareo, 1976; Bourdieu, 1966).

The factors that lead low status individuals to poor school performances and to the phenomenon of early school leaving are not just ascribable to the lack of economic, social and cultural resources of the families, but also to the way school acts towards disadvantaged youths. School is accused of discrimination of many talented boys and girls with no familiar tradition of secondary school and without an income and lifestyle suitable for scholastic demands and subcultures (Ardigò, 1972). As a contribution to this consideration, in the Italian context, the well-known *Lettera a una professoressa* (Letter to a teacher) written by Don Milani’s kids, speaks out against school’s function of social selector towards youths coming from the working class: school is strongly criticized because it acts as “a hospital which heals the healthy ones and rejects the infirm ones, a mean of irreparable social separation”, “a custom-made school for rich people.

Those individuals who already have culture in their own houses and go to school just to collect diplomas” (Scuola di Barbiana 1967).

Sociological interest towards the persistence of educational inequalities however can't make us forget that the 20th century is the one in which Europe almost reached the aim of full youth population schooling. This fact highlights the process of progressive annihilation of inequalities concerning access to compulsory school, even if the issue of selection shifts actually to next education levels, in which unequal choice, possibility to continue educational paths and performance opportunities linger on (Besozzi, 2006).

4. B1.1 Problems in the access to the educational system

Public expenditure on education, schooling social support and the right to education. In many countries crisis has affected education budgets, especially in those with large public deficit (Magatti, 2012; 2014). Eurydice Report (European Commission/EACEA/Eurydice, 2013) shows that cuts in education budget were made in twenty European countries, but cuts amounting at more than 5% were observed only in Greece, Italy and Portugal. Between 2007 and 2010, the number of school teachers has generally followed the fluctuations of the student population: but in Italy (and in the UK), teacher's numbers declined by 8.5%, while students' numbers continued to increase. In Italy and in three other countries (Bulgaria, Latvia and Lithuania), efforts to control public spending have also led to reductions in the number of institutions.

If we consider the percentage of the educational public expenditure on financial aid to pupils and students, data highlights an higher increase in Italy than the European average.

The Italian increase overcomes the European one, with a little difference: Italy passed from 4.1% in 2000 to 6.9% in 2010 of financial aid for all levels of education; in the same period from 0.7% to 3.2% at primary and secondary level, from 18.3% to 22.5% at tertiary level. A relevant decrease in Italian expenditure took place in 2008 (4.6%), when the crisis began. We can also notice that the Italian percentage of public expenditure in primary and secondary education is lower than the European average, while is higher in tertiary education.

In nearly all European countries the annual expenditure on public and private educational institutions per full-time equivalent primary pupil was higher in 2009 than in 2000, but Italy was an exception: it experienced decreases in expenditure, in real terms, per primary pupil. In tertiary and adult education a reduction of more than 5% was registered, but the biggest cuts were made in Cyprus, Lithuania and Greece (more than

25%). In general Italy, as an effect of the crisis, reduced the budget for compulsory schools and maintained quite a stable budget for tertiary/adult education.

If data on public expenditure for students is available in Italy, it is difficult to describe the development of Social school support (SSS) because educational services are characterized by a recent history and a territorial heterogeneity. We don't know exactly what kind and how many services are present in the national context. The main measures of SSS – support for food, bus, books expenditure – are funded by local governments: a recent research of Save the children (2013) concerning 36 municipalities highlights a lot of differences among access requirements for food support: in some municipalities there aren't any exemptions, in others the requirements for exemption are different and the contribution varies from town to town. A limited number of cities involved in the research have implemented measures to support families in facing their problems caused by economic crisis and rising unemployment (Verona, Parma, Pisa, Bari, Sassari). In some cases, foreign minors or children whose families didn't pay for food are excluded from these services.

Recently, with the Decree Law “The education starts” (12 sept. 2013, n. 104), Letta government (centre-left) promoted welfare interventions for students and their families: in s.y. 2013/14 15 millions euros were allocated to cover costs of transport and food for students of secondary schools, basing on economic status and merit; 15 million euros, in particular for upper secondary schools, were allocated in order to buy e-books and digital materials with a free access for students; 8 million euros earmarked for books to lend to disadvantaged students.

We can analyze now the evolution of the right to education in tertiary education. The right to university education concerns support for the students without economic resources and identifies in scholarships (“*borse di studio*”) the main measure, provided as an economic support or as a service (accommodation and food). In Italy the number of students entitled to a scholarship hasn't changed in the last ten years (16% of students attending university) and the gap between students entitled and beneficiaries remained permanent. The legal framework actually provides the right to receive the scholarship to students with merit or economic disadvantage, but it doesn't guarantee the attainment that depends on the level of resources funded by national government and region. Among 100 students entitled to the scholarship, 72 received it in 2002/03 and 75 in 2010/11 (cf. Table B.1.1). Moreover, there are great differences between the North and South of Italy: in the North 90% benefits from a scholarship while in the South only 60% does (Laudisa, 2012).

In general, there were not any relevant changes in the social support of university students but we can see a decrease of national and regional funding caused by the crisis.

However the policies for accommodation have had a good development. The number of “beds” reached 38% of students without residence in 2001/02 and 51% in 2010/11. But, upon the whole, in Italy a bed is guaranteed only to the half out of the students that study outside (4% of students), with an average far from countries such as France (11%) or Germany (13%). Also food support – available to students with different costs on the basis of the ISEE value (Indicator of the family economic condition) – follows a trend similar to the other benefits. Despite the fact that the level of this kind of service remained stable in the last ten years, Italian universities still have a limited number of canteens. In 2010/11 we had 210 university restaurants, while France had 620 and Germany 700 (countries with the same level of university population).

The economic resources (deriving from the central and regional government) represent the main cause of the spare social support for university students. National funding has been decreased, reaching an amount lower than € 100 million in the last two years. Otherwise, there is not a precise State or Regions’ responsibility to share the expenditure for this kind of service. The legal changes – D.Lgs. 68/2012 – that have been introduced in order to make tools and services suitable for the education rights, haven’t been improving the condition of disadvantaged students yet.

As already mentioned (cf. Section A.1), Italy is the only OECD country that has not increased the spending per student in primary and secondary education since 1995. This remained still for the past 15 years, increasing by only 0.5% in real terms (Oecd, 2013). While the expense per tertiary student rose by 39% over the same 15-years period, rather above 15% OECD average increase, this was largely due to an increase of funding from private sources³⁵. Nevertheless, the spending for tertiary-level students remains well below the OECD average.

From 2001 to 2010, the annual expenditure per student decreased from 27.2% to 24.7%, in particular at the educational levels corresponding to ISCED 2-4 and 5-6 (Table B1.2). We can conclude that the main feature of the Italian trend is the decrease of the annual expenditure per pupil/student, which has begun before the more recent economic crisis.

Access to pre-primary education. Italy is one of the seven EU countries that has not established neither a legal entitlement to ECE (Early Childhood Education) nor compulsory enrolment in it. However, pre-primary school represents a strong point of Italian educational system. From 2000

³⁵ This occurred once the Law about the “schools parity” was promulgated (L. number 62, 2000). According to this, the public school system in Italy includes both state and non-state schools, all following the same standard of quality and equity established by the State. By funding (with 1% out of the total expenditure for education) the private offer of schools, the law acknowledges the principle of equitable treatment of schools and parents who wish to exercise their right to make decisions about the schooling of their children independently from the costs (see Glenn, de Groof, 2012; Ribolzi, 2012).

to 2011, an increase can be observed in the number of pupils (from 1,567,000 to 1,694,000), with a stable 48% represented by females.

Over the period from 2000 to 2011 in most EU countries the participation rate in ECE (children between 4-years-old and the starting age of compulsory education) increased: only in Italy (and in Belgium) there was a small reduction which might be due to the “ceiling effect”, when 100% was recorded in 2000 (compared to 96,8% in 2011: European Commission/EACEA/Eurydice/Eurostat, 2014).

In s.y. 2011/12 almost the totality of the children (4-5years-old) were enrolled in ECE, namely 95.1% of the same age population, overstepping the EU 2020 target (95% in 2020: see Istat, Cnel, 2014).

There is a significant difference in ECE attendance rates between immigrants and non-immigrants in Italy. Non-immigrant 15-year-old students were more likely to attend ECE for more than one year than first or second-generation students. On EU-28 average the difference in participation rates is 12% while in Italy, United Kingdom (Wales) and Iceland it is particularly high – about 30% or more.

Analysing the public or private management of schools, the percentage of pupils enrolled in pre-primary public schools passed in Italy from 72.5% in 2001 to 71% in 2011: despite the trend is quite uniform, in 2006 and 2007 a relevant decrease of pupils occurred in public schools (-4%). Eu average expenditure on pre-primary education (ISCED 0) as a percentage of GDP increased between 2006 and 2010. It rose from 0.46 % of GDP in 2006 to 0.52 % in 2010. Instead the greatest decline occurred in Italy and Hungary (-0.05 %).

5. B1.2 Between access and success. Analysing the participation of specific groups

Participation of children with disability. As aforementioned (Section A.2) the percentage of pupils with disability in relation to the total number of pupils in Italy grew from 2000/01 until 2012/13, especially in compulsory schools, passing from 2 to 3% in primary school, from 2.5 to 3.7% in lower secondary school (Fig. B1.2). In upper secondary school, we can observe a variation from 0.9% (2001/02) to 2% (2012/13).

There are relevant differences across Europe in the proportion of children identified as having SEN (special educational needs), which draw on data published by the European Agency for Development in Special Needs Education in 2010 (Nesse, 2012). Data shows considerable variation in the percentage of the school population in compulsory education identified as having special educational needs, ranging from 1.5% in Sweden to 2.3% in Italy to 24% in Iceland. There is also a marked variation in the proportion of children placed in special schools and classes,

ranging from 0.1% in Italy to 5.8% in Switzerland, which has a relatively high proportion of pupils in segregated special classes.

In Italy mental health is the main pathology among disabled pupils. In primary education also learning disability and difficulty have come out recently. The majority of pupils with learning difficulties or behavioral problems, especially in the North, has a certification of disability (by the Law 104/1992) but actually there is nearly 10% of problematic pupils without certification, mainly in the South.

The proportion between the number of pupils with disability and “supportive” teachers in public schools is stable over time, corresponding to one teacher for two pupils with disability. However in the South the proportion diminishes to 1.8 pupils. From 2003/2004 specialist teachers are featured by a continue increase, corresponding to the increase of pupils, but the annual variation from 2007 to 2010 was quite negative.

80% out of the specialist teacher’s body are involved in curriculum activities, while 20% have functions of care and assistance. In the North the number of hours of support per pupil (5 hours/week) is lower than in the South (12 hours/week). It has also slowly increased the number of primary and secondary schools that invested in the reduction of architectural barriers. Participation of pupils/students with disability in extraschooling activities is limited (only half of students have access: Istat, 2014a).

As the equity policies Italy chose (since Law 517 / 1977), as others countries in Southern Europe and Scandinavia, the admission of students with disability in ordinary classes, providing different supports and programs (i.e. specialist teachers, materials, training, instruments, individual plans) directly to the “inclusive classes” (by Law n.104 / 1992). In the considered period (2000-2012) there were some changes in the legal framework due to the increasing acknowledgement that the presence in upper secondary schools is lower than in the former educational levels, although we can see a relevant presence in VET courses (mainly in the shorter ones).

The most important deliberation is the Law 170 promulgated in 2010, after a long pressure campaign carried out by parents’associations and rights movements, which acknowledged the right of pupils with learning difficulties – such as: dysgraphia, dyslexia, ADHD syndrome, etc - to deserve special measures of facilitation, compensation or dispensation in the ordinary school programs.

Recently the “direttiva 27.12.2012” and “Circular letter n.8/2013” underlined the inclusive role of the educational system to guarantee the right to learn to all kinds of student with special education needs (called BES in Italy). New forms of helping and new organizational resources are going to be devoted to BES students and inclusive schools, but it’s too early for assessing their impacts.

Though official data doesn't show any cuts in the number of specialist teachers that support students with disability, in the last years families associations and teachers trade unions are worried about the risk that the spending review can also affect this group.

Participation of students with ethnic minority background. Italian schools are characterized by a rapid evolution of the foreign school population, which took place with exponential increase especially in the last decade as proof of a recent immigration history, typical of Southern European countries: in a few years Italy reached the same levels of foreign presence of the countries with older immigration traditions (Santagati, 2013a). In the face of a significant growth in absolute values, though, Italy is among the European States a nation where the incidence of foreign pupils is still medium-low (lower than 10%), therefore distant from the nations with a higher percentage impact, with relevant quotas of second and third generations and naturalizations and with a consolidated experience in the management of multi-ethnicity in the school system. Pupils of non-Italian citizenship (NIC) in Italy, especially first generation, suffer from a well-known and specific vulnerability in the education field, and have worse performances in comparison with native students, higher probability of an early drop out of their educational and/or training path, higher risk of becoming NEET and of suffering from material poverty and social exclusion.

In the period taken into consideration the main impulse to growth was the arrival of foreign minors directly from the countries of origin, thanks to family reunifications that took place in particular after the regularization law (Bossi-Fini Law n.189 / 2002). From 1.8% of foreign students in 2000/01 there was a progressive increase until 8.8% in s.y. 2012/13. From 2008/09 to present however there has been a slowing down of the growth, that highlights the passage of Italy to a phase of greater stabilization and normalization of migratory flows in the school system (Santagati, 2013b). The ratio of foreigners on the total of the pupils, continuously growing for each grade level of school, cannot be simply connected to the increase of NIC pupils, but can be linked to a slight reduction of native pupils. As Ministry of Economy and Finances stated (2011), in the near future school-age population could significantly decrease due to the contraction of migratory flows and because of the persistent economic crisis.

As for the different school levels, between 2000/01 and 2012/13 the foreign pupils enrollment grew overall. Primary school is the one sector that has always had the greatest number of NIC pupils, but in 2012/13 for the first time it was followed by the others (MIUR, ISMU, 2014). Analysis of the pupil's percentage of distribution in the various school levels in the last two decades highlights two important transformations:

- firstly, there has been a relative decline in the number of foreign pupils in primary school and a strong expansion of this group in secondary schools. If in 2000/01 a weaker presence of foreigners in the second cycle of education was observed—a probable consequence of an over-

representation of an immigrant population of childhood age linked to recent migration—, today this void has been filled by the growing up of the second generations within the Italian school system, in addition to the constant arrival of preadolescents and adolescents due to family reunification procedures. So, recently, the distribution of foreign pupils is mirroring with more similarity the composition of the overall school population: as above mentioned, Italy has reached a more mature and stable migratory phase;

- secondly, a relevant change occurred in rapid increase of foreign pupils/students born in Italy from immigrant parents. This presence has almost doubled itself in six years, going from 34.7% out of the NIC pupils in 2007/08, to 47.2% in 2012/13³⁶. This component has increased significantly in primary school and pre-primary school. As foreign pupils born in Italy have already reached the majority of the foreign school population, they hold educational needs different from the first generations, thus requiring new didactic responses to be implemented. Moreover it arises the quest of recognizing citizenship to these children who were born in Italy and who grow up and study there (Santagati, 2014).

6. B1.3 Contrasting failure and promoting success in education

Early School Leaving. In Italy ESL³⁷ percentage had a great reduction from 25.1 in 2000 to 17.1 in 2013. The situation remains worst for men (20.2%) than for women (13.9%), better for employed (6%) than for unemployed (11.1%). These data are under the average rate of Eu27 and very far from the benchmark established by Lisbon Strategy and Europe 2020 (10% ESL or lower).

The decrease 2000-2013 is partially due to positive effects of the European investments on permanent education, which all EU member states have been entitled to; therefore, this does not appear to be a peculiarity of the Italian case. The position of Italy within the European ranking remains unaltered: Italy is still ranking 5th from the last in the EU 27 ranking, best performer country only if compared with Spain, Portugal, Malta, Iceland and Macedonia (Colombo, 2013b).

A recent investigation focuses on a representative sample of 1.508 twenty year-old Italians (born in 1991) who, after completing lower secondary school, have achieved the minimum level of school performance (evaluation: “sufficient”), with a high risk of school dropout. The ISFOL survey (Crispoliti, Stroppa, Spigola, 2012) identified 3 sub-categories: 38% left school before obtaining any certificate, 6% enrolled in vocational training; 56% completed their educational cycle in delay obtaining a diploma. The three sample categories are marked by different social

³⁶ The trend is growing even more, being registered by Miur (2014) that Italy-born foreign pupils in 2013/14 represent 51.7% of the NIC population in the national school system.

³⁷Early school leavers: people aged 18-24 who have finished no more than a lower secondary education and are not involved in further education or training.

itineraries, which correspond to different grades of likeliness of social exclusion (higher for ESL, while less probable for VET students and upper secondary certificate holders): the survey identified a few *risk variables*, possibly linked with students' careers and their experience with the educational system. Among dropouts, such risks stem from the uncertainty of their experience after leaving school, in case they fail to receive an effective support from specific vocational guidance or employment services. Their isolation from school, their sense of failure and disappointment, as well as the scarcity of job opportunities and the opposing attitude of their families are more likely to make them end up as NEETs than the other groups.

In addition there is a "management risk", which may be caused by the educational system such as: in Italy, poorly-educated young people are generally unwilling to turn to guidance services and are not aware of the possibility to continue studying after dropout. It is not possible to rely on the current offer of guidance services, as these latter –even when working properly– are unable to meet the potential demand which often remains totally unspoken. The few existing services (school registry offices, counseling and guidance services, remedial lessons, temporary careers to avoid losing school years) are badly managed, which results in a lack of co-ordination between schools and local authorities.

Finally, a recent document of the Ministry of Education (2013) underlines that among pupils at risk of dropping out foreign born pupils overcome native born and Italian pupils in secondary education. In lower secondary schools the percentage of "at risk foreign pupils" is 0.49%, if compared with 0.17% concerning Italian pupils. The trend in upper secondary schools is similar, as foreign students correspond to 2.42% and Italians to 1.16% risk-ratio. Foreign born students have more difficulties than native born: in lower secondary schools 84.5% of foreign students with a likelihood of dropping out are foreign born; this group reaches 91.9% among foreign students attending upper secondary schools.

Selectivity on tracking and transitions processes. From an analysis of different indicators (participation rates in secondary/tertiary education, school achievements and success, qualification rates, choice of upper secondary schools), it is possible to understand the problems experienced by different groups (by gender, citizenship, educational level, etc.) in Italian school system, as a consequence of selectivity on tracking and transitions processes.

The evolution of *participation rates* in different scholastic levels underlines the universal access of pupils in compulsory education (primary/lower secondary schools). However in upper secondary schools the participation rate is lower than 100%, despite of the principle of "right and duty of education or training for all" introduced since 2003 by Minister Moratti³⁸. In 2000/01, 87.4% of 14-

³⁸ See the previous section A.1.

18 years old attended this education level: this percentage increased to 92.3% in 2009/10, also as an effect of the legal extension of compulsory education (16 years in 2006/07).

There are no relevant *gender* differences, but females are slightly more represented in upper secondary schools. Also Italian students, if compared to foreign students, and students with a high status show an higher presence in upper secondary/post compulsory schools. The transition from lower to upper secondary schools can be considered an important step to identify problems in equality of access among different kinds of students.

As the *educational success*, in secondary schools we can observe an improvement in the school pass rates: in lower secondary schools the percentage of successful students every 100 students assessed increases from 95.6% in 2001/2 to 97% in 2012/13; in upper secondary schools the percentage passes from 84.7% to 89.2% in the same period. Statistics from the Ministry clearly show the disparity of achievements between Italians and foreigners, a gap that is constant in time and across the various educational levels.

However secondary schools are not homogeneous in the foreigners' educational success rates: a higher percentage of successful foreigners can be observed in lyceums and a lower one in vocational schools, similarly to what happens to Italian students. It can be observed, therefore, a similarity in the trend of the school experience between Italian and foreign pupils, which is influenced not only by the ethnic variable but by other personal and family characteristics (gender, socio-economic status and cultural capital, etc.) as well, besides other "school's effects" (type of secondary school attended, school multi-ethnic composition, contents of curriculum, didactic styles adopted, facilitating measures, etc.) (Colombo, 2014; Colombo, Santagati, 2014).

As the *equity among schools*, the Italian school system, if compared with others OECD countries, reveals differences between schools higher than differences within schools (Azzolini, Vergolini, 2014). Students' achievement rates vary more in relation to the school attended, than to individual features of students. In all regions one can notice a strong effect of "hidden selection" that concentrates students with the same economic, cultural and social backgrounds in the same type of upper secondary schools, producing a "horizontal inequality" among schools (EIU, 2012). Students with a high status are overrepresented in lyceums and underrepresented in vocational and technical institutes. Early choice (at the end of lower secondary education, that means at 13 years) can explain inequality and super-selection because it links the school choice to family resources and status (Giancola, 2009)³⁹. Also the percentage of students that obtain the final diploma is higher in lyceums, followed by technical and vocational institutes: this makes realistic for low-background students to reproduce their social disadvantage.

Gender, as status and ethnic background, is one other feature that affects educational pathways. In Italy females show full participation to education, achieving a sort of overtaking of males both

³⁹ Early tracking is not the only explanatory factor of the inequality among schools but there is also the negative impact of the scarcity and unefficacy of the guidance services.

in upper secondary schools and university. Women therefore perform better than men, with higher percentages of women qualified at the end of lower secondary and every type of upper secondary schools.

One can identify some gender differences/inequalities in terms of educational choices. Girls suffer from an horizontal educational segregation, because they are concentrated in fields of study such as “education”, “health and social work”, “literature and arts”, linked to weak jobs in the labor market (Eurydice, 2009; Andreotti, Mingione, Pratschke, 2013).

As the choices in upper secondary schools, it’s worth considering differences between Italian and foreign students. In the last decade we can observe the following trends:

- among Italians there has been a progressive increase of enrollments in lyceums, and a slight decrease of enrollments in technical and vocational schools, with the latter anyway being the “least chosen type”;
- on the contrary, foreigners are still more present in vocational schools than in lyceums, even if the concentration in this kind of school in the decade considered has decreased in favor of a percentage growth of enrollments in technical schools and lyceums.

In the last twenty years the “channeling of choices” of foreign students in Italy has been deeply analyzed in the light of a number of variables, mainly economic but also linked to family plans, to the results achieved in the first level of education, to “school effects” such as teachers’ orienting advice and high schools’ efficacy in the reception of this kind of students (Besozzi, Colombo, Santagati, 2009; Colombo, Santagati, 2010).

There are however some differences in the choices – within the group of foreigners – due to residence, gender, nationality, and place of birth. The foreigners’ inclination for vocational training paths is remarkable in the North of Italy (where the VET supply is larger) whereas in the Center and South the percentages of enrollments in lyceums are higher than elsewhere. This depends on the job possibilities that each territory can offer, on specific labor cultures, and on the characteristics of the educational offer, affecting equally Italian and NIC students (Santagati, 2011; 2012). The choice of enrolling in lyceums, moreover, is higher among girls and Europeans, whereas Moroccan pupils are more represented in training schools, followed by Indians, Pakistanis, Tunisians and Ecuadorians. Moldavians and Chinese, on the contrary, choose first of all technical schools, a preference that is also expressed in high percentage by Romanians and Peruvians. Finally, the students born abroad mostly choose vocational schools, while the students born in Italy mainly choose technical schools and scientific lyceums.

The upper secondary school choice raises problems for many students, who risk a subsequent early school leaving if they are weakly supported or not accompanied at all. Since the pointed-out data show a worrying number of failures in the first year of vocational school and a low level of learning of 15-year-olds in the same type of school: as a matter of fact, the weakest individuals in terms of learning, and not only the foreigners, are tracked into

vocational-oriented schools (Colombo, Santagati, 2014), which are, therefore, marked by a concentration of subjects with school problems, low socio-economic status and a scarce family cultural capital. In a word, “bad schools” where the conditions for a recovery of learning are often lacking.

The issue, therefore, is dual: there is not just a need to develop a better orientation for foreign students in order to reduce any obstacles or barriers that can prevent disparity in the access to high school education, but it is also necessary to increase the quality of technical and vocational schools in order to assign to them equal dignity in comparison with the other educational channels, both for Italian and foreign students.

Retention. In Italy the retention rate in primary schools is nearly null, children must repeat the year only if they attend school for an amount of hours lower than 75% of total (EACEA, Eurydice, 2011). In lower secondary schools the retention rate decreased from 4.4% in 2001/2 to 3% in 2012/13; even in upper secondary schools the percentage changed from 15.3% to 10.8% in the same period. The statistic data of the Ministry show the disparity of achievements between Italians and foreigners, featured by a higher degree of retention among foreign students than the native ones in all the school levels (8.1% in lower secondary school and 21.6% in upper secondary school: Table B1.7).

Retention is stronger in upper secondary education, in which it is an indicator of educational selectivity, as it is particularly high among foreigners, males, and low status students. This means that educational disadvantage is affected by individual and familiar features of students. The retention rate is also linked to the type of upper secondary school: higher in vocational and technical institutes (nearly 10%), where foreigners, males, and low status students are overrepresented, and it has increased in this kind of schools in the last decade.

On the other hand, students attending lyceums (especially scientific or classical lyceums) show the lowest percentage of retention (3-4%). Among this group of students, we can observe an underrepresentation of low status, males and foreign students.

Specific national programmes for improving educational performance. The period 2000-2014, analyzed in this report, is characterized by a long political debate, lasting nearly a decade, concerning the need of a structural reform necessary for an improvement of the Italian educational system, in terms of equity and quality: however, the subsequent attempts of reform (i.e. Berlinguer, Moratti and Gelmini Laws), carried out both by centre-left and centre-right governments, were only partly implemented and repeatedly postponed or abandoned (Moscati, 2008). This condition of a “never concluded reform” was worsened by an increasing awareness

of the crisis among Italian citizens, followed by policies of austerity and spending reviews developed within a neo-liberal agenda.

In this unstable political frame, the idea that the Italian education had particularly worsened from the point of view of learning was widespread, but it remained rather unspecific until 2000, the year in which the results of the Pisa survey launched by Oecd to assess 15-year-old students' literacy abilities were published (Ribolzi, 2014)⁴⁰. Performances of Italian students were very negative if compared with those related to the other Oecd countries, and revealed deep discrepancy among different regions, different types of upper secondary schools, genders, citizenships⁴¹. In the following Pisa surveys (2003, 2006, 2009, 2012) we can point out a general improvement in the Italian performances, but students of the Southern regions, students attending vocational schools, male and first generation immigrants remained already low achievers. These results underline that organizational and teaching model was producing and continues to produce negative outcomes in terms of equity, since the different population groups reach quite different learning levels.

Although, in recent years Italy made some progress in outcomes of its education system; it still lags behind most of the EU countries in terms of human capital formation. From 2000 up to now, Italy didn't introduce national measures for improving educational performances, with the only exception of the enlargement of compulsory education, the recognition of educational credits for students that attended school years without obtaining specific attainments or credits for student workers acquired during the job experiences⁴². As Colombo (2010), early school leaving still represents a *neglected problem* for the social and political agenda in Italy, due to its endemic nature and to the scarce pressure by the public opinion and the media.

In some cases, extraordinary funding are dedicated to groups at risk of educational failure (i.e. funding for "areas with high concentration of immigrant pupils" since 2001; National Plan "Italian as a second language" for newcomer students operating since 2008; etc.), but the progressive contraction of economic resources calls into question the continuity of actions and projects.

Nonetheless the lack of a comprehensive strategy against early school leaving, some contrasting programs have been developed in Italy supported by European structural funds (2000-2006) and the Social Cohesion Action Plan funds (2007-2013), used within the National Operative Plan (PON) for the Southern regions that show the highest rates of ESL (Calabria, Campania, Puglia, Sicilia). The monitoring reports concerning projects funded by EU PON (Guglielmi, 2006; Miur, 2009; Isfol, 2012) highlight the involvement of thousands of schools,

⁴⁰ See also section A.3.

⁴¹ International literature also shows that educational inequalities are magnified by national-level tracking institutions and that standardization decreases inequality (Van de Werfhorst, Mijse, 2010).

⁴² See the previous sections A.1, A.2.

pupils and families, teachers, but the gap among territories still remains significant and we are still far from a national model of intervention that could be implemented in all the schools.

Recently, the September 2013 decree-law on education n. 104 (and the following program of supplementary and innovative didactics, DM n. 87/7.2.2014) introduced an integrated program to tackle ESL in problematic areas⁴³. This extends school opening hours and provides for initiatives to better integrate pupils with a migrant background. This is a further use of the European Structural and Investment Funds, that are expected to significantly contribute to the fight against ESL in Southern regions throughout the 2014-20 programming cycle (EU DG education and training, 2014).

7. B1.4 Improving competences of adolescents and adult population

Improvement of the educational level of population. The education level of the adult population represents a good index of knowledge and competences linked to the human capital of a country. Low education levels expose adults to higher risks of social exclusion, unemployment and difficulty in the access to lifelong learning programs.

In 2012 the majority of the Italian adult population reached a lower secondary attainment as highest qualification, though in the last decade the average educational level improved significantly. However, among the population aged 15-74 38.7% have an upper secondary attainment and among 15-64 years old people this percentage grows to 41.9%. The group aged 20-24 is featured by the highest rate of people with upper secondary attainment (70.9%) while this percentage decreases as the age increases.

If we consider the population with tertiary attainment, there was a relevant increase from 2002 to 2012 in the group with this educational level: actually are graduated 12.9% of people aged 15-74 and 13.8% of people aged 15-64. The percentage is higher than the average value in the group aged 25-34 (22.3%) and 35-44 (17.4%).

The educational level of 30-34yrs. people are one of the benchmarks identified by the European Commission for the Europe 2020 target: 40% of young people aged 30-34 has to reach a tertiary attainment or equivalent. Currently in Italy only 21.7% of 30-34 years people hold an university degree, but this group has increased of 6 points in the period 2004-2012. Among industrialized countries Italy has one of the smallest groups with tertiary attainment.

On the contrary, if we analyse the percentage of population with a low cultural capital (below secondary attainment), there is a reduction of this group that can be considered “weak”, from a cultural, social, economic point of view. In 2002 the percentage of adult population (aged 25-64)

⁴³ See also the following B.2.

below secondary attainment was 55.7 while in 2012 it stepped back to 42.8 of the adult population (-12.9 points), without differences in the trend between males and females.

If we compare the educational levels of the Italian and foreign population, we notice that among Italians the number of people holding a diploma or a degree decreases as their age range increases. On the contrary, among foreigners there is a smaller number of people with a school or university degree under 34 years of age, that probably depends on their decision to leave school in their home country and to move abroad (or either on having left school in the receiving country).

It is true that some bright spots can be found in the educational pathway of native born foreigners, who often achieve the same educational levels as their Italian mates and choose among multiple educational options, which in turn improves their skills and school performances; however, first generation foreigners are definitely the most vulnerable category in terms of education and one who deserves proper attention.

Finally, in Italy the participation of adults to lifelong learning results insufficient, if compared with the European average and with the Eu benchmarks. Considering the participation in education and training in the former four weeks, there was a small increase from 2000 to 2013 in the percentage: in 2013 6.4% of people aged 25-64 and 5.6% of people aged 25-74 participated to VET courses. The percentage is higher than the average in the group aged 25-34 (13.4%). There is a large group of adults excluded from education/training activities, in general more represented among males, people with low cultural capital, people aged 50-74.

Global evolution of PISA results (2000-2012). As seen in 2012 report of Oecd Program for International Student Assessment (Pisa), in Italy there have been consistent signs of improvement in the quality of basic education. Italy was one of only three countries (together with Poland and Portugal) where the proportion of 15-year-old students who performed poorly in mathematics decreased and the proportion of high-performing students increased between 2003 and 2012 (Oecd, 2014).

In the last edition of Pisa Oecd survey (2012), in Italy mean score in reading, mathematics and science is still below the Oecd average – as in the other European Southern countries (Landri, 2008) –, but Italy is one of the countries that improved most markedly in both mathematics and science performance, particularly between 2006 and 2009. In fact, starting from the survey carried out in 2003, the outcomes of Pisa were extensively discussed, processed also at a regional level, and taken as a starting point for drawing up new educational policies. This data revealed the urgency to introduce in the school system some quality assessment policies, to keep under control the “production factors” of education⁴⁴.

⁴⁴ Cf. section A.3.

Overall in 2012 the proportion of low achievers in Italy are somewhat higher than the EU average in reading, maths and science, but performance is in line with or above the EU average in the Northern regions and significantly worse in the South. Since 2006 there has been a positive trend in the results for reading and science. In 2012 performance in maths has stagnated compared to 2009, but is better than in 2003 and 2006. Although the performance gap between natives and first generation immigrants is large, second generation immigrants partially catch up. The influence of socioeconomic status on pupils' performance is weaker than the EU average (Eu DG education and training, 2014).

Mean score in reading among 15-year-olds in Italy is below the Oecd average and remained stable between 2000 and 2012: in 2012, in particular, students score 490 points in reading, showing a performance similar to those of the students of Portugal and Spain. Girls outperform boys in reading by an average of 39 score points, with a gender gap similar to the Oecd gender gap and stable over the period. Moreover, in reading natives perform better than second generation students, but second generation students outperform first generation: this distance remained quite stable from 2000 to 2012.

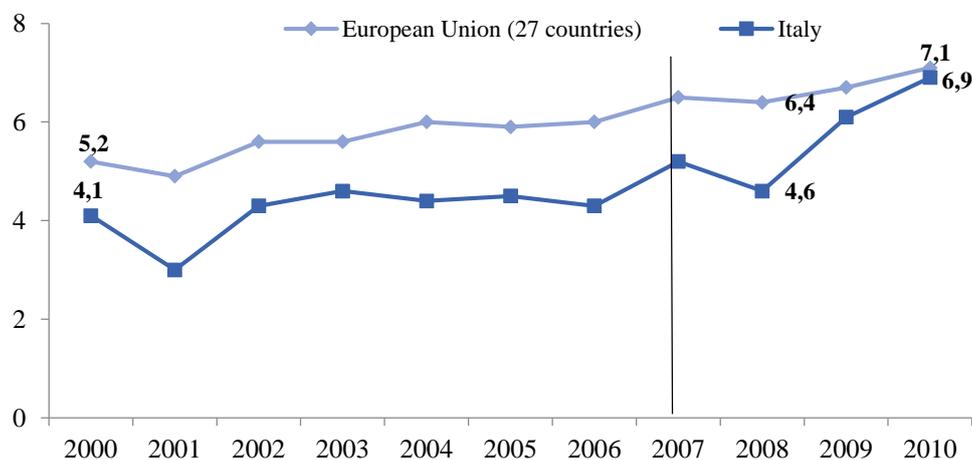
Mean score in mathematics is also below the Oecd average, but Italy is one of the countries with the largest improvement in this subject. Students score 485 point, on average, in mathematics (2012): boys outperform girls in maths by an average of 18 points, a larger gap than observed across Oecd countries. Italy is also one of the countries with the largest improvement in science performance between 2006 and 2012: mean score in science however remains below the Oecd average (494 points).

Immigrant students in Italy score lower points in reading, maths and science than non-immigrant students, a condition well above the Oecd average score difference. This gap reflects disparities in socio-economic status but is also linked to the migration status: new immigrants in Italy tend to be much more socio-economically disadvantaged than established immigrants, since language barriers are an important obstacle to learning.

In general, considering the longitudinal trends of Pisa surveys, Italy shows above-Oecd-average equity in education outcomes, without sacrificing equity in education: in Italy, a more socio-economically advantaged student scores 30 points higher in maths than a less-advantaged student (+39 across Oecd countries). But the improvement in mathematics performance is observed among all socio-economic groups: in Italy performance has improved, while equity has remained quite stable without improvements.

Annexes

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



Source: Eurostat

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

	Students entitled to the scholarship	Beneficiaries	Beneficiaries/Entitled %
2001/02	207.421	136.896	66.0
2002/03	189.880	137.703	72.5
2003/04	184.046	133.714	72.7
2004/05	187.600	139.113	74.2
2005/06	187.619	140.219	74.7
2006/07	188.897	153.189	81.1
2007/08	188.331	156.297	83.0
2008/09	184.043	151.760	82.5
2009/10	183.323	154.263	84.1
2010/11	181.312	136.222	75.1

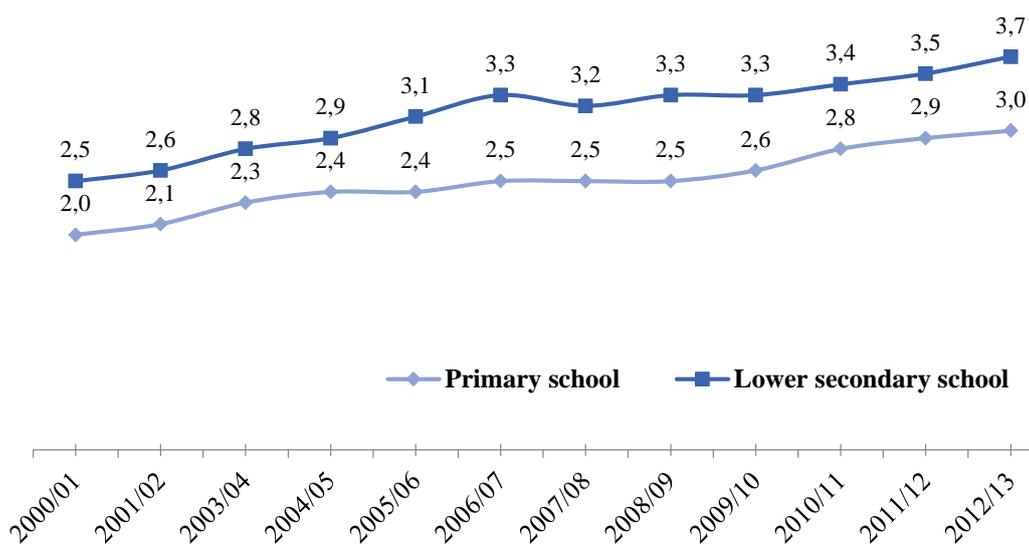
Source: Ministry of Education.

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

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
All ISCED	27,2	24,9	26,5	25,5	24,9	26	23,9	25,8	25,8	24,7
ISCED 1	24,3	24,4	25,5	25,2	23,5	24,8	22,6	24,7	25,5	24,5
ISCED2-4	30,5	26,5	28,3	27,4	26,6	28,1	25,0	27,1	27,0	25,3
ISCED 5-6	31,1	30,3	30,7	27,7	28,5	28,4	27,8	28,6	29,7	29,9

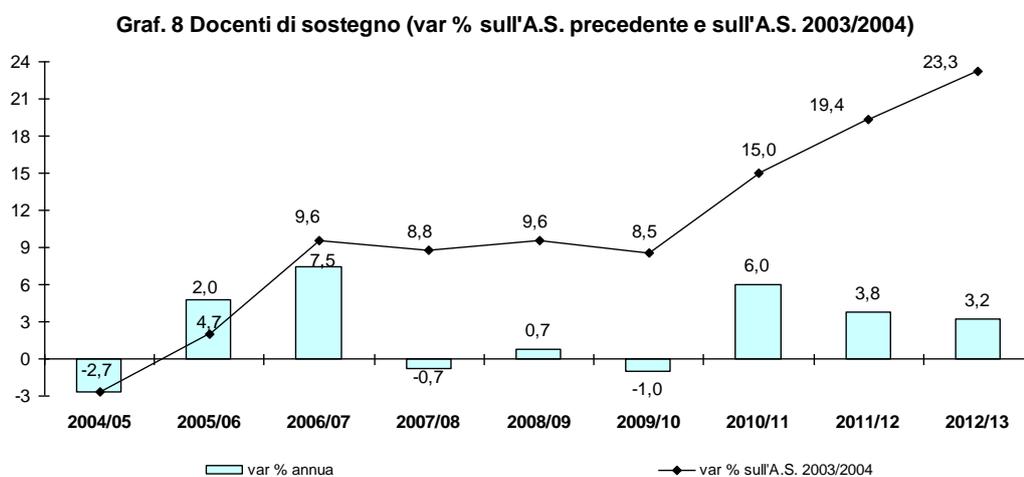
Source: Eurostat

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



Source: Ministry of Education.

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



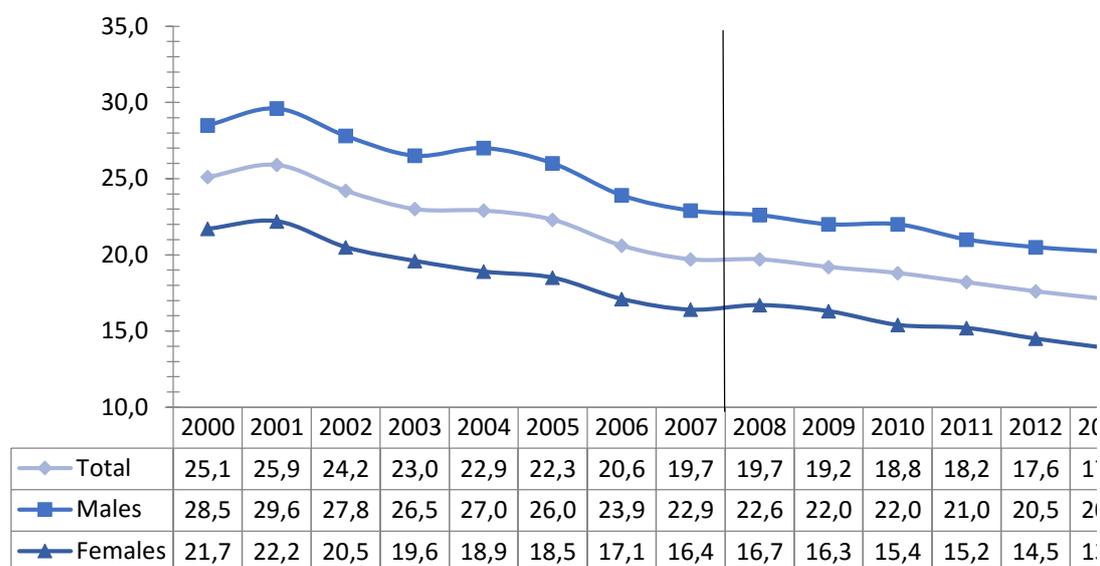
Source: Ministry of Education

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

<i>School year</i>	Immigrants per 100 pupils	Descendants of immigrants per 100 NIC pupils
2000/01	1.8	-
2001/02	2.2	-
2002/03	2.7	-
2003/04	3.5	-
2004/05	4.2	-
2005/06	4.8	-
2006/07	5.6	-
2007/08	6.4	34.7
2008/09	7.0	37
2009/10	7.5	39.1
2010/11	7.9	42.1
2011/12	8.4	44
2012/13	8.8	47.2

Source: ISMU processing of MIUR data.

Figure B1.4 Early School Leaving Rate



Source: Eurostat

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

	<i>Lower Secondary school</i>	<i>Upper Secondary school</i>
Italians	0.17	1.16
Foreign students	0.49	2.42
Total	0.20	1.24

Source: ISMU-MIUR.

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

	Lower secondary schools		Upper secondary schools	
	Total	Foreign students	Total	Foreign students
2001/2	95.6	87.4	84.7	77
2003/4	95.9	89	85	72.7
2004/5	97.3	89.9	84.8	72.3
2006/7	96.8	90.5	85.8	72
2009/10	95.3	87.8	85	70.6
2012/13	97	91.9	89.2	78.4

Source: MIUR- ISMU

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

	Foreigners		Italians	
	2002/03	2012/13	2002/03	2012/13
Lyceums *	21.9	22.9	41.8	47.5
Technical Schools	35.5	38.5	36.8	33.4
Vocational Schools	42.6	38.6	21.4	19.2
Total	100	100	100	100

Source: ISMU-MIUR.

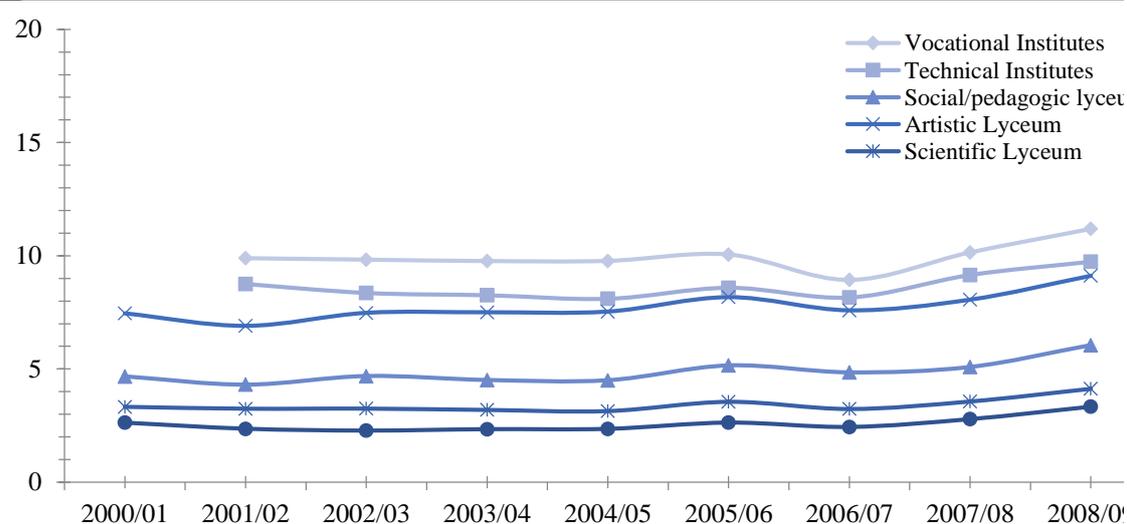
Note: *These include classical, scientific, teaching, and art high schools

Table B1.7. Retention rate (per 100 students assessed) among Italian and non-Italian students, by school level (INDICATOR 8) (2001//02 - 2012/13)

	Lower secondary schools		Upper secondary schools	
	Tot	Foreign students	Tot	Foreign students
2001/2	4.4	12.6	15.3	23
2003/4	4.1	11	15	27.3
2004/5	2.7	10.1	15.2	27.7
2006/7	3.2	9.5	14.2	28
2009/10	4.7	12.2	15	29.4
2012/13	3	8.1	10.8	21.6

Source: MIUR- ISMU

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



Source: Istat-Miur.

Table B1.8 Population with the upper secondary attainment (%) (INDICATOR 10)

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
15-74	31,8	33,8	34,8	35,2	35,5	35,8	36,1	36,7	37,4	38,1	38,7
15-64	35,2	37,3	38,5	38,9	39,1	39,3	39,5	40,2	40,8	41,4	41,9
15-19	11,2	15,4	14,1	14,2	14,1	14,4	14,0	13,5	14,3	13,9	14,9
20-24	67,7	68,0	70,4	68,8	69,0	69,2	69,7	69,6	70,4	70,8	70,9
25-34	47,3	48,5	50,7	50,1	49,8	49,3	49,0	50,2	50,3	50,4	49,6
35-44	38,5	40,0	41,2	41,8	41,3	41,6	42,0	42,4	43,4	43,6	44,7
45-54	28,6	31,9	33,6	35,1	36,3	37,0	37,5	38,5	39,1	40,3	40,4
55-64	16,8	19,4	20,7	22,1	23,4	24,4	25,3	26,4	27,5	29,5	31,0
55-74	13,2	15,3	16,2	17,3	18,3	19,3	20,2	21,1	22,2	23,8	25,1

Source: Eurostat

Table B1.9 Population with the tertiary attainment (%) (INDICATOR 11)

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
15-74	8,1	8,4	9	9,8	10,4	11	11,6	11,8	12	12,2	12,9
15-64	8,8	9,2	9,8	10,7	11,4	12	12,7	12,8	13	13,1	13,8
20-24	1,4	1,9	2,6	4,8	6,4	7,1	6,8	6,7	6	6,1	6,7
25-34	12,4	13,1	14,6	16,1	17,3	18,9	19,9	20,2	20,7	21	22,3
35-44	11,1	11,3	11,9	12,7	13,6	14	15,2	15,4	15,8	16,6	17,4
45-54	10,3	10,8	11	11,2	11,2	11,3	11,9	11,8	12	11,5	12,3
55-64	6,7	7	7,2	8	8,6	9,4	9,8	10,3	10,7	10,8	11,4
55-74	5,4	5,5	5,8	6,2	6,7	7,2	7,6	8	8,5	8,6	9,3

Source: Eurostat

Table B1.10 Percentage of population aged 25-64 below secondary attainment (INDICATOR 12)

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total	55,7	53,1	51,1	49,6	48,7	47,7	46,7	45,7	44,8	44	42,8
Males	55	52,6	51,3	49,8	49,1	48,4	47,6	46,5	45,7	45,2	44,3
Females	56,3	53,6	50,9	49,4	48,3	47	45,7	44,9	44	42,8	41,2

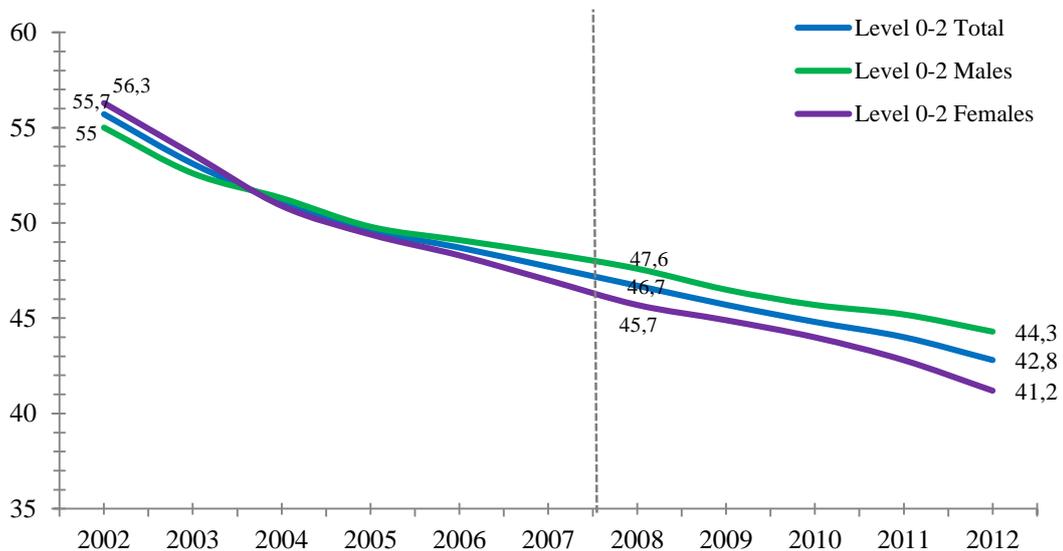
Source: Eurostat

Table B1.11. Percentage of population aged 25-64 below secondary attainment (INDICATOR 12)

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total	55,7	53,1	51,1	49,6	48,7	47,7	46,7	45,7	44,8	44	42,8
Males	55	52,6	51,3	49,8	49,1	48,4	47,6	46,5	45,7	45,2	44,3
Females	56,3	53,6	50,9	49,4	48,3	47	45,7	44,9	44	42,8	41,2

Source: Eurostat

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



Source: Eurostat

Table B1.11 15-64 year-old foreign and Italian population by level of education, in 2010

	Lower secondary school degree		Diploma		University degree	
	<i>Foreigners</i>	<i>Italians</i>	<i>Foreigners</i>	<i>Italians</i>	<i>Foreigners</i>	<i>Italians</i>
	15-24 years	71.1	52.7	27.9	44.1	1.0
25-34 years	45.4	26.9	43.7	50.8	11.0	22.3
35-44 years	45.2	40.8	43.5	42.9	11.3	16.3
45-54 years	44.6	49.5	42.2	38.6	13.2	11.9
55-64 years	55.1	62.1	31.9	27.2	13.0	10.6
Total	49.7	46.3	40.3	40.4	10.0	13.3

Source: Istat.

Table B1.12 Percentage rate in education and training (last 4 weeks) (INDICATOR 13)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
25-64	4,8	4,5	4,4	4,5	6,3	5,8	6,1	6,2	6,3	6,0	6,2	5,7	6,6	6,4
25-74	4,8	4,5	4,4	4,3	5,4	5,0	5,3	5,4	5,5	5,2	5,4	4,9	5,8	5,6
25-34	11,7	11,5	11,1	11,2	12,7	12,3	12,5	12,9	12,8	12,8	13,0	12,4	13,6	13,4
35-44	3,1	2,7	2,7	2,7	5,4	4,9	5,3	5,3	5,6	5,0	5,3	4,7	5,7	5,6
45-54	2,1	1,8	1,8	1,9	4,2	3,7	4,2	4,2	4,4	4,0	4,3	3,8	4,8	4,5
55-64	0,7	0,6	0,7	0,8	1,8	1,6	1,8	2,1	2,2	2,3	2,5	2,4	3,0	2,9
50-74	1,1	0,9	1,0	1,1	1,8	1,6	1,8	2,1	2,2	2,1	2,4	2,2	2,8	2,7

Source: Eurostat

Table B1.13 Mean score in reading, mathematics, sciences per gender and migration status, Italian students, in Pisa OECD (2000-2012) (INDICATOR 14)

<i>Reading scores</i>						
	<i>All students</i>	<i>Female</i>	<i>Male</i>	<i>Native</i>	<i>2nd generation</i>	<i>1st generation</i>
2000	487	507	469	-	-	-
2003	476	495	455	478	-	420
2006	469	489	448	473	465	404
2009	486	510	464	491	446	410
2012	490	510	471	497	457	422
<i>Mathematics scores</i>						
	<i>All students</i>	<i>Female</i>	<i>Male</i>	<i>Native</i>	<i>2nd generation</i>	<i>1st generation</i>
2000	457	454	462	-	-	-
2003	466	457	475	468	-	441
2006	462	453	470	465	431	421
2009	483	475	490	487	450	420
2012	485	476	494	490	461	435
<i>Science scores</i>						
	<i>All students</i>	<i>Female</i>	<i>Male</i>	<i>Native</i>	<i>2nd generation</i>	<i>1st generation</i>
2000	478	483	474	-	-	-
2003	486	484	490	489	-	418
2006	475	474	477	479	434	418
2009	489	490	488	494	451	411
2012	494	492	495	499	470	438

Source: Pisa OECD 2000, 2003, 2006, 2009, 2012.

B2. Final notes on Equity and Quality: Orientation and processes

The crisis impacts in Italy. Without any doubt Italy is one of the most suffering countries within the Eurozone for the impacts of the financial crisis. Not only for the great reduction of productivity, which brought about the loss of many workplaces in traditional economic sectors (manufacturing, building and public employment more than others) but also for the length of the austerity time. Since the rapid (and terrifying) increase in the spread in early 2011, all the national fiscal, productive and investment strategies were altered in function of the “sovereign debt crisis” with direct negative effects on lending, public spending, and on the local service standards, and – what is more remarkable – on the general level of consumption.

This has generated permanent economic compression people tended, and still tend, to save money instead to spend or invest it like a “rational response” to the crisis. Several factors can explain this trend:

- a) high taxation regime due to the need to control the fiscal debt (even if Italy reports the highest rate of tax evasion in Eu);

- b) employment policy based on expansion of temporary positions, resulting in low wages, precarious savings, and restrictions of the rights of workers (mainly the younger ones);

- c) discouragement provoked by the limited (or none) growth outlooks.

The long wave of the economic downturn is not stopped yet and this is one of the causes of the lack of optimism and the feeling of injustice that are widespread in every sector of the Italian society in the moment.

Italian politics against the crisis have been oriented initially to support banks and large firms, and cutting public spending. Regions, schools and universities (mainly funded by the State), and public employees were the main victims of the cuts, followed by sanitary services and the big infrastructural projects. As the crisis became longer than expected, many public resources have been devoted to cover the increasing cost of unemployment, across the institute of C.I.G. (*Cassa integrazione guadagni*), which ensures from 12 to 36 monthly wages paid by the State to all the workers who have lost their jobs for firm closure. As a result, resources became insufficient to support investments for new drivers of growth.

The traditional productive structure in Italy, however, is made of an large amount of small size firms, which did not receive any form of help from the government when the crisis turned up. Thus many of these firms de-localized their production in underdeveloped countries (due to the lack of demand and – at the same time – the lack of penalization) or, with no alternatives, sold it to foreign investors or blocked it. Very few of them have re-converted or modernized the fabrication cycle and products by investing in R&D and internationalization. Between 2008 and 2014, one can say, the Italian traditional model of growth (the so called “made in Italy”) has been

destroyed (Di Chirico, 2010), and despite the four governments that have proceeded since then, no one has been able to define a new model so far.

This premise is needed to understand better : in which landscape the crisis affected the national education system; the loose coupling that ties education and labour market and, on the contrary, the strong relation between education and public sector; the reasons why educational reforms are so difficult and inefficient for both quality and equity, especially during the negative economic trend.

The occupational system during the crisis. It is worth recalling the main characteristics of the education-jobs structure link in Italy (see section A.1). Job opportunities are not equally distributed within the national territory, while the education supply (as provided by the State) shows a more homogenous distribution; by consequence the level of education of the adult population (which can be a good indicator of the crisis impact, but only theoretically) does not reveal in every area the same life conditions.

For those who live in Northern or Central regions, being qualified or graduated means on average increasing the chances to get a job before the adult age and improving the life standard over a mid-term life cycle (10-15 years). More probable for them is also maintaining a job despite the downturn. Instead for those living in Southern regions or islands, the risk of over-education, under-employment or unemployment is more widespread, no matter what educational level they hold, and their school-to-work transitions may require long term efforts (20-25 years) and (for some) bear the risk to fail in the end. The risk-at-poverty rate, as a matter of fact, doubles for Southern regions and islands if compared with the national average (the families in relative poverty are 26,2% South vs. 12,7% Italy, 2012) and it multiplies by four if compared with the other parts of Italy (26,2% South vs. 6,6% North+Centre) (Istat, 2014, p. 257). The crisis effects are so tangible within this population, already suffering for economic sperequation, along with other social disfunctions: illegal jobs, youth recruitment by the crime organizations, corruption of public officers, and fiscal evasion.

In the light of this fragmented frame, interpreting the reactions of educational system to the crisis by having general measures as indicators, such as the percentage of secondary-tertiary attainment or similar, it is difficult and does not account how specifically the crisis has had impacts on the social stratification and what role education (if any) has played in protecting people against the negative trend.

As mentioned in section A.1, *the crisis has worsened the already existing divides in the educational field*, in other words it generated obstacles to the former universalistic policies carried out by the Ministries of education before 2003 with a “welfarist” and state view of schooling, and neutralized whatever attempt to reduce inequalities *via* education reforms. As Grimaldi and Serpieri (2012), this previous “welfarist legacy” has been then substituted by right-centre

governments (in the periods Ministry Moratti:1994-1996, Gelmini:2008-2011) with a new era of the restructuring of education, between managerialism, decentralisation and an attentive neoliberalism, but the crisis together with the political change stopped this attempt and the 3 following governments (Ministries: Profumo, Carrozza and Giannini) avoided to re-start the school reform. Going back to the education-occupation link, being so difficult to find a job at the end of a qualification process, it is not surprising if during the crisis a vast percentage of population are led to disinvest in higher education and try to enter the labour market earlier than they planned before. The indicator representing better the impact of the crisis on education, is thus the decrease of new students enrolled at university from 2008 to 2013, which has to do with other impressive indicators of the NEETs increase from 19.5% in 2009 to 22.7% in 2011, and that of constant increase of youth unemployment (15-29 years) from 2008 to 2013.

Equity and Quality in Education during the crisis⁴⁵. The diverse political orientations in the field of education strongly affected the results on Equity and Quality that nowadays one can notice. When the Ministry of Education was managed by the Right Wing, the key words of the system reform were: devolution, managerialism and meritocracy. For the Left Wing the aims of educational reforms were: centralistic control (of human resources, budget, and curriculum), resources for special needs education and school dropout prevention, and teachers professionalism.

The rapid alternation of the two political sides in the period taken in consideration (2000-2012) did not permit to carry out any reforms, then none of the wings had accomplished its purposes. As the negativity of this “impasse”, it’s worth mentioning that right-oriented policy aimed to cut exceeding spending for the school bureaucracy (ministry departments, regional offices, schools administration), even reducing the budget available to each single institute (Campione, 2013):

“In 2008-2011 the right Government subtracted resources to schools, university, and the scientific research. It impoverished the whole administrative structure of MIUR coming very near to the limit of “impossibility”. I’m talking about ministry and all its regional and local branches, they did not invest on the improvement of managers... so in these conditions nothing can change. Is this a “liberal” approach? In my opinion it is scarce government ability, or lack of a whole vision of the processes, or subalternity to economic-financial objectives”.

On the other side the Left Wing was so unstable that none of its programmatic lines have been sustained and carried out efficiently. The only reform it got through was the enlargement of compulsory education (from 14 to 16years, in schooling or VET indifferently), which had been

⁴⁵ This paragraph has been prepared on the basis of points discussed with the expert professor Vittorio Campione, ex-consultant of the Ministry of Education, interviewed in Rome, December 10th, 2014. His words are highlighted in Italics.

started by the previous Right Wing ministry however. The reform of teachers professionalism (which had to be joint to a national assessment of the teaching results), promoted under the Berlinguer Ministry before the crisis impacted on Italy, took a long time to be discussed and finally collapsed. It met the strong opposition of public employment's trade unions and the whole teachers' body (Ribolzi, 2006; 2012). As a result the "quality issue" in the educational system – since 1999 – has been viewed as a "political taboo" for both sides.

One other "lacking" point that can be attributed to the weak government of the Left Wing is the uncertain relationship between academic and professional cultures. The pursue of a closure between the two fields (School and Job) might be one of the strongest points of a Left wing program, but besides the formal agreements, it has not been set up so far:

"in Italy the conception of the School as "enemy" of the Job and, conversely, of a workforce that mistrust who have culture and all the intellectual classes is widespread. The reciprocal prejudice dates 1923, with the Gentile reform, and still nowadays one can hear parents saying to children: "if you don't study, I send you to work!" that is, the culture of working is the only tool for self-empowerment with detriment of the schooling."

Even Mr. Monti's government (dec 2011- feb 2013), which had a large political support in the Parliament (from center-right to center-left), expressed ambitious objectives in terms of school reform. He was not able to modernize the system of technical and professional education (and re-configure its relationship with generalist education) because of the financial restrictions. An interesting programmatic document was issued by Minister Francesco Profumo (2012) to foster "digital agenda" and "portfolio of innovation" in all the public administration and services, starting by the schools. This document witnesses the good reasons, but also the incapacity of this Government to build a structural reply to the critical dynamics of the period.

Facing the crisis however some results in terms of school modernization have been achieved by the central government policy, stressing those priorities that each parts mainly agreed to:

1. teacher employment (it deals with overtaking precariousness in teachers' recruitment, one of the greatest plagues of the public school system in Italy, see Gremigni, 2013) and conservation of the same National Contract defined before the downturn;
2. digital gap reduction (that means: connectivity in all institutes, LIM and Tablet offered by Ministry to a significant number of schools, enhancing the digital competencies of teachers, see the national Plan for digital schools, Avvisati et al. 2013);
3. enlargement of the compulsory education and development of IeFP system at a regional basis (3 year-long VET course to be attained in place of upper secondary school) ;
4. parity among schooling and VET courses within the "Education as a common good" manifesto (Campione, Bassanini, 2012; Ribolzi, 2013);

5. curriculum reform: Minister Profumo (MIUR, 2012) issued national guidelines for the 1st cycle of education, still ongoing (this document is written on the basis of former President of Republic Decree, n. 89 / 2009, which became mandatory only in 2011/12).

In addition, the education system in Italy can not be defined as “motionless” during the crisis because a number of minute changes have occurred at various levels; but as they were pushed by alternative forces (innovation, competition, prevention of exclusion and recovery, etc.) the result is nothing but an organic reform.

What is important to underline is that despite the crisis the general orientation towards the equity, at a formal level, did not regress because neither the requisites by law nor the indicators of school participation, access, and success, indicate a decrease of the social demand of education. But in general terms the scarce quality of the upper secondary education (mainly technical and professional institutes, which recruit the large part of the disadvantaged youth), and the lack of dropout prevention in the lower secondary, can be enumerated as factors of low equity.

“The Italian education system is often considered a good one in the field of equity, access and educational success, if one considers ESL rates or BES student participation. But if we analyze data flows within the upper secondary education pathways, it shows that between the entry cohort (about 650.000 units each year) and the exit ones (500.000) there is a waste of 150.000 youngsters. This waste is permanent in the end. Where are they now? Have they been recovered by the educational system (i.e. in a VET channel)? Or have they been lost? Even if not all of them were irremediably lost, a system that permits this kind of “jumping” (outside and inside the various education offers, with any accountability of the results) cannot be defined as an “equal system”.

The weak equity of the education system in Italy has been emphasized by many commenters in the past (even before the crisis impact), due to the factors already mentioned:

- existing territorial divides in terms of students performance and profitability of the education certificates (or probability of employment);
- lack or weakness of the measures for preventing school failure and dropout (Colombo, 2010), made more serious by the lack of a National Register of students;
- high risk of “school segregation” across early tracking, because of the weight of social origins on individual school choices (net of previous performance) (Azzolini, Vergolini, 2014).

According to the GERESE document (2005) the issue of equity in education technically refers to three main indicators: a) *inter-individual equity*: average of students’ performance and standard deviation (degree of inner differentiation among students), b) *minimum threshold*: the proportion of students who don’t achieve the minimum threshold in learning; c) *inter-categorical equity*: the influence of family background on student performances.

As Benadusi, Fornari and Giancola (2007), in the Italian school system all these dimensions are correlated and contribute to design a frame of permanent inequality, raising from PISA 2003 and 2006. On the basis of this data, Giancola (2010) states in Italy strong inequalities of opportunity occur in *attainment*, due to a selective two-stage process: first, the impact of social origin on the choice of upper secondary education and, second, the impact of the pathway on the students' subsequent scholastic choices (i.e. the completion of the study course and the entry in a tertiary pathway). However inequalities in *achievement* seem lower, so the weight of choice appears particularly high, while that of performance correspondingly low (Contini and Scagni, 2012).

With reference to the impact of lower secondary school reform (1962) on inequalities in scholastic attainment, Azzolini and Vergolini (2014) mention the existence of mixed evidence: given the effects of tracking, first on choices and subsequently on performance, it is extremely probable that the reform has diminished social inequalities of opportunity in the field of competency compared with the previous situation. Perhaps a part of the weak impact of social origin on achievement, as highlighted by the PISA investigation, is the longterm consequence of that reform.

Equity and educational success. Linking the Equity issue to that of educational success, a wider definition of success is needed. *“According to my opinion, success refers to the activation process on the whole, I mean, not only the achievement of a diploma, but more precisely the profitability of it, the full correspondence between the certificate one holds and the demand of the labour market.”*

In this sense the Italian school system stays as an unequal agency that spreads a not unlimited resource (education titles) in a discriminatory way. This mainly occurs for the stronger influence of family background on the school choice, rather than of the individuals' performance - and, secondly, for the weight of school choice (that is, of the school offer) on performance and, consequently and on occupational success. Discriminatory is also the way by which the entry in the labor market is structured, more across informal networks and less by meritocracy: this latter can lead young people to disinvest in their own education as it is loosely coupled to occupation.

But, according to the expert's opinion, austerity can bring about the development of new behavior within school users and enterprises, pushed to invest more "on the job training" of young people at the end of secondary tracks.

“If in the past, entrepreneurs were characterized by opportunistic choices (i.e. I hire a graduated worker but, if he/she is unexperienced, I underpay him/her), during the recession I witness that, they start to take in account the need of new 'professionalism' in the firm. Maybe I'm talking about a small number of cases, but I hope they will become significant: firms give up

to invest on top managers for saving costs, and start to bet on 'medium' management, I say technical staff, which is the heritage of our system of technical and professional upper schools. This is occurring in those economic sectors in which Italy is more competitive: fine mechanic, conductors industry, green energy, biological food and so on. I do mention single institutes (as ITIS Avogadro in Torino, Nobili in Reggio Emilia, Aldini Valeriani in Bologna and Galilei in Roma), which have been engaged for a few years in agreements with the top competition firms of the local production networks. Finally, schools are connected to work system!"

With no doubt the link with enterprises can renew the whole upper school system, particularly the education targeted on the medium-low background youth (Technical and Professional Institutes), that is, giving a very large audience in Italy, disseminated in all the territories, equal chance to social insertion in the most competitive economic sectors. This would become a factor of balance and equity enhance.

"The school-work alternation has to be totally renewed in the light of the crisis, if the school system aims to get the opportunity of this recession to improve itself; so far, crisis has depressed school motivation because of the lack of finalization in terms of job. Increasing the chance to enter the production system after the school path is – as a matter of fact – the best driver for the study motivation, at any level and in any school segment, even for the Lyceums students. For doing so, it's needed to transform each school in an offer of 'excellence', that is, coming back to give importance to the content of education and not only to its ways of functioning (such as free choice, inclusiveness, democracy, etc.). This a matter of Equity overall."

Orientations. Giving all the strength and weakness points of system, the drivers of change (getting opportunities from the recession time) have to be three:

1. the whole **completion of autonomy**, not in the sense of privatization and commercialization of schools (Grimaldi, 2013), but in the sense to reinforce the local networks (schools-municipalities, schools-social services, schools-enterprises, schools-non profit organizations). For this purpose it can be useful to enlarge the effective power of management, deliberation and sovereignty of institutes, even using the recent law on measures for "simplification of public administrations and development" (n. 35 / 2012) (Campione, 2013).
2. The completion of the **digitalization plan**. Making better use of technologies leads to reconfigure spaces and organizations within the education offer. *"ITC are nowadays the only mean to change school organization in depth, they can affect the content of learning-teaching as well as the way by which education is provided, and we don't exploit them enough"*. A wider use of ITC is required also to personalize school choice and personal involvement of the student in his/her own path; personalization leads in

itself to a more shared and convinced choice and it's probable by consequence they will succeed.

3. **Changes in the educational inputs.** Education, and mainly the secondary pathways, should become more customized to meet the social demands according the existing variety of beneficiaries. One of the easier points to change might be the time school reform: *“In our country the timing structure of schooling is the same since decades, in which youth stays at school for a given number of hours (usually very few, 5 or less per day) to be exposed to a given number of subjects (usually many more than in other OECD countries). It's time to put this structure under discussion, to understand why Italians are “shaped” in this way, what hinders that in future it would transform in a more flexible timing structure: I think, so to say, to some Northern European countries where lyceum offers a short range of standard and basic subjects (language, maths, English and L2), compulsory to all, and in addition students can choose subjects and time schedules in a “open list” of activities and disciplines.”* It is not clear whether personalization of the school offer will make education more sustainable or more expensive; for sure it might be a solution to prevent early school leaving and, by consequence, reducing the costs of ignorance and dropout (Brunello, De Paola, 2013). A legal framework for these changes is already existing (L. 275 / 1999) but any Ministry has solicited schools to adjust their time schedule so far, mainly because a re-modulation of school activities would require different engagement of teachers. It has worth mentioning that a recent bid has been promulgated by Ministry of Education in 2014, which called for “integration activities” (*didattica integrative*) in all schools to be provided in the afternoon according to specific projects and local network agreements (DM N.87, 7 feb 2014); impact evaluations of this measure are not yet available.
4. Improvement of the **national evaluation system** and its application to students and schools performance. As mentioned in A.3, assessment of the quality and efficacy of the education system in Italy stands still in progress. Standardized tests for students' learning assessment - provided by the Italian Institute for Educational System Appraisal (INVALSI) - became compulsory only since a few years ago and met the resistance of teachers and principals. At the moment the key element certifying the quality of education provided in Italy are just teachers, whose convincement and involvement in school assessment becomes even more strategic. Assigned inspectors are too few for an external evaluation then the only sustainable approach will be the internal one. Recently new guidelines for self-evaluation have been provided to institutes (RA – self evaluation report, VSQ Project – evaluation and quality

development) but assessment procedures are not compulsory. *“Our national evaluation system still needs to be built, and improved. We are at the beginning. We can take from some good tools or benchmarks from abroad, but paying attention to be open-minded, several tools can fit into to our situation rather than others are not fitting into Italy. I opt for incentives to the self-reporting of schools, such as “case study” methodology and teaching to teachers and principals to highlight what is working better in their schools”.*

Summary and conclusion

This report is designed for the Italian situation facing the economic downturn and its main impacts on education. The question at stake is at what extent Italy’s education system was (and still is) affected by the crisis as for the education’s quality and equity and how it managed the governance of recession and the interplay between reduction of resources (economic side) and needs of social protection (social and political side) for disadvantaged people.

Firstly Italy is characterized since times by territorial, economic and gender divides, thus the negative trend has worsened the traditional disparities.

Secondly the national system of education – mostly centralized - is widespread in all areas but differs in quality, equity and profitability of education according to the level of development of regions (Centre-North: more dynamic) (Southern-Islands: “motionless” or recessive). High rates of ESL and NEET are strictly related to youth unemployment especially in the Southern/Islands: Downturn confirmed but not increased ESL rate, because of a number of reforms/measures against youth inactivity and school abandon taken from Ministry since 2000 and carried out by alternative Governments with discussing outcomes.

Thirdly, as crisis is concerned, two different streams have been observed: on the one hand education system showed a surprising resilience, enduring in offering equal access and opportunity (see participation rates of disabled pupils, foreign pupils, and reduction of ESL and the low-performing students) as it did before the crisis. On the other hand public investment for education suffered consistently, class size enlarged and school time shortened, and teachers salary stopped increasing with the price rise.

Lastly over the period 2000/2012 education in Italy has been concerned with reforms in contrasting and not in efficient ways. Some changes occurred in the school organization, curriculum, prevention-policy fields but every step had limited effects on quality and equity. Maybe, as Ribolzi (2013, p. 123) the time of great system reforms is likely to be over, but – lasting the crisis - there should be some directions the political decision-makers could follow. If costs

are fixed, innovation and prevention measures have to be taken in order to avoid worsening processes in any sides; so different spending organizational method have to be adopted.

Four priorities rise from the discussion carried out here: completion of schools autonomy, completion of the digitalization plan that will provide all schools with updated ITC, changes in time scheduling of the school offer, and completion and implementation of the national evaluation system.

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National Studies

Country Report Greece

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Contents

LIST OF TABLES AND FIGURES.....	194
INTRODUCTION	196
A. BACKGROUND INFORMATION	199
A1. GREECE: CONTEXT	199
I. Population qualification, employment, and education.....	200
II. Political cycles and educational policy: an overview of major trends in educational measures	208
III. Main educational policy after the onset of the crisis	212
Annexes.....	216
A2. THE EDUCATION SYSTEM: A PROFILE	222
Annexes.....	232
A3. PROCESSES AND MECHANISMS OF MONITORING AND EVALUATING THE EDUCATION SYSTEM	235
B. CRISIS AND ITS EFFECTS ON EDUCATION.....	239
B1. EQUITY: POLICIES AND ACHIEVEMENTS	239
Percentage of students with schooling social support-Expenditure per student (as % of public expenditure).....	239
Expenditure per student (GDP)	240
Pre-schooling enrolment.....	240
Participation of children with disabilities	241
Participation of students with ethnic minority background, immigrants & descendants of immigrants.....	241
Early school leaving (drop out)	242
Selectivity on tracking and transitions processes.....	242
Retention Rates.....	242

Specific national/political programmes for improving school performance.....	243
Population with the upper secondary attainment	244
Population with the tertiary attainment (ISCE 5 A or B).....	244
Percentage of population aged 25-64 below secondary attainment	245
Percentage of adults within vocational and educational system	245
PISA results (2000 - 2012)	246
ANNEXES	248
B2. FINAL NOTES ON EQUITY, EFFICIENCY AND QUALITY: ORIENTATIONS AND PROCESSES	253
References.....	255

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 100.000, 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 A1.3; A1.4). 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.

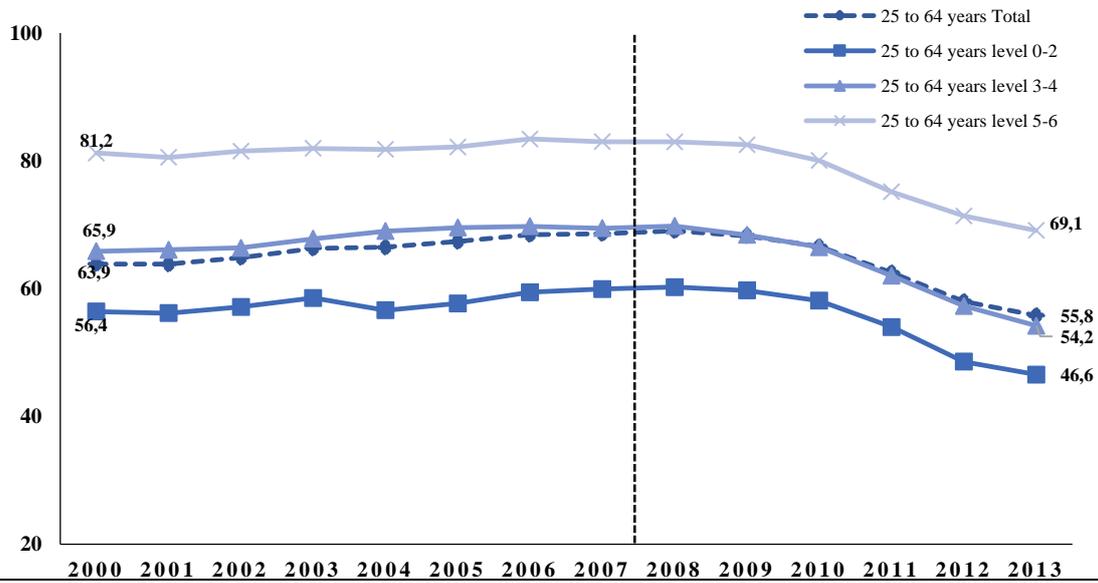
The data by age category shows the declining of employment rate at younger ages (36% those aged 15-29). More particularly, the employment rate of 15-24 years old declined by almost 16% (from 27,6% in 2000 to 11,9% in 2013); the employment rate of 25-29 years old declined by almost 20% (from 68,1% to 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 fig A.1.1; A1.2).

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 fig. A1.6; A1.7).

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% (table A1.2.).

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% .

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 table A.1.3).

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 table A.1.4).

- 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% (fig.A1.8).

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 fig.A.1 A1.9).

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 enischyitiki 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 Symvoulío 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.

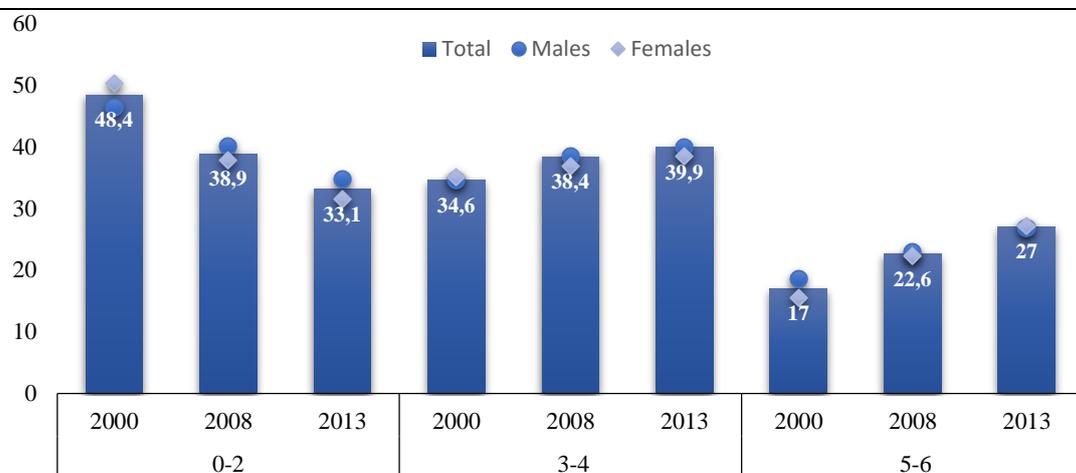
It is too early to evaluate the aforementioned measure; critique however shows that many more students will be now obliged to follow extra courses at the 'phrontistirio' (private institution providing lessons to students to help them with school exams). Those who cannot afford it shall be less well prepared 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.

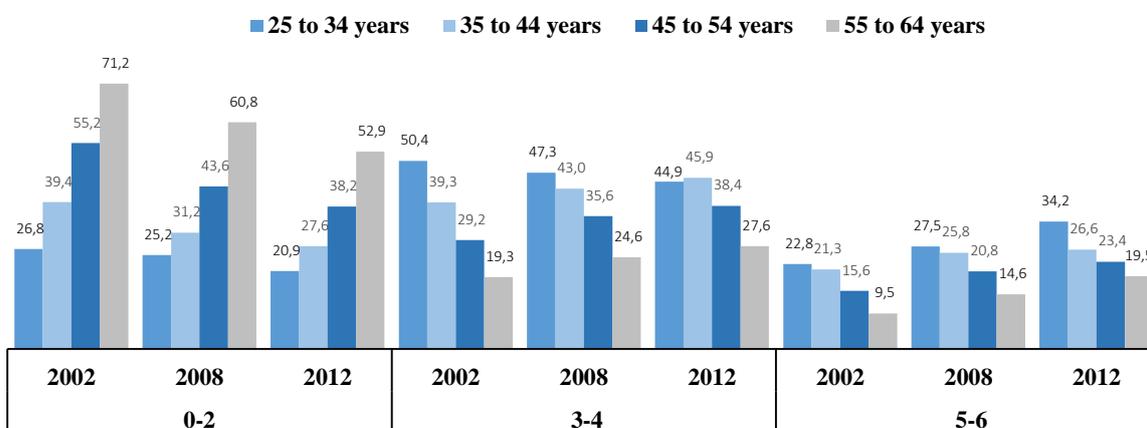
Annexes

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



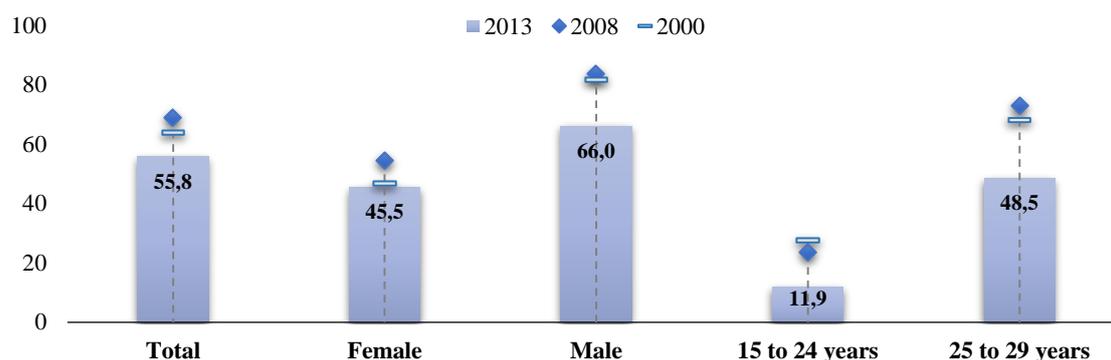
Source: Eurostat

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



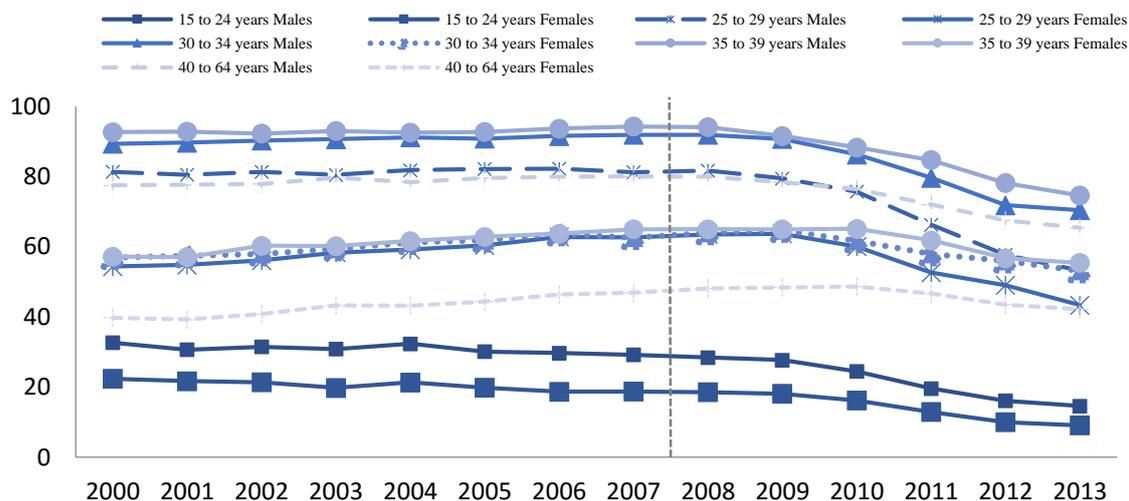
Source: Eurostat

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)



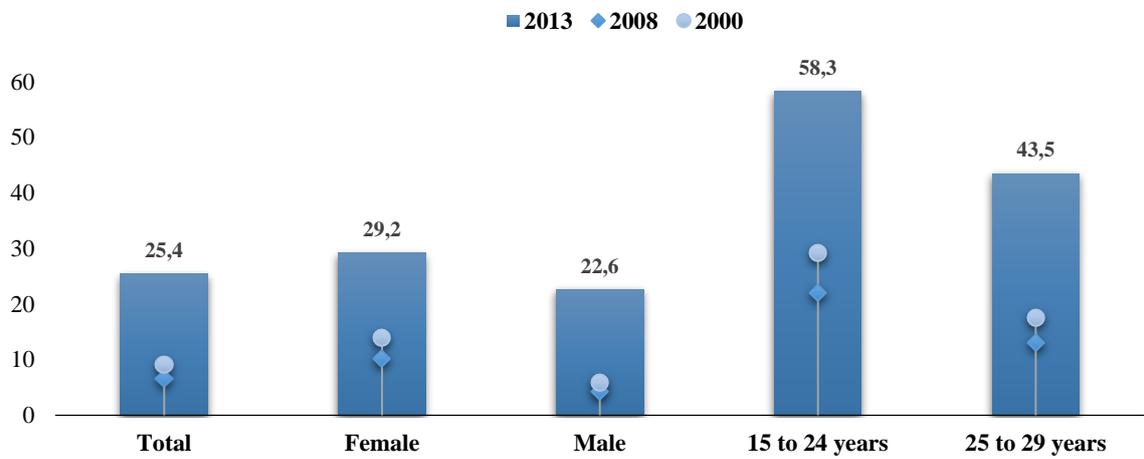
Source: Eurostat

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

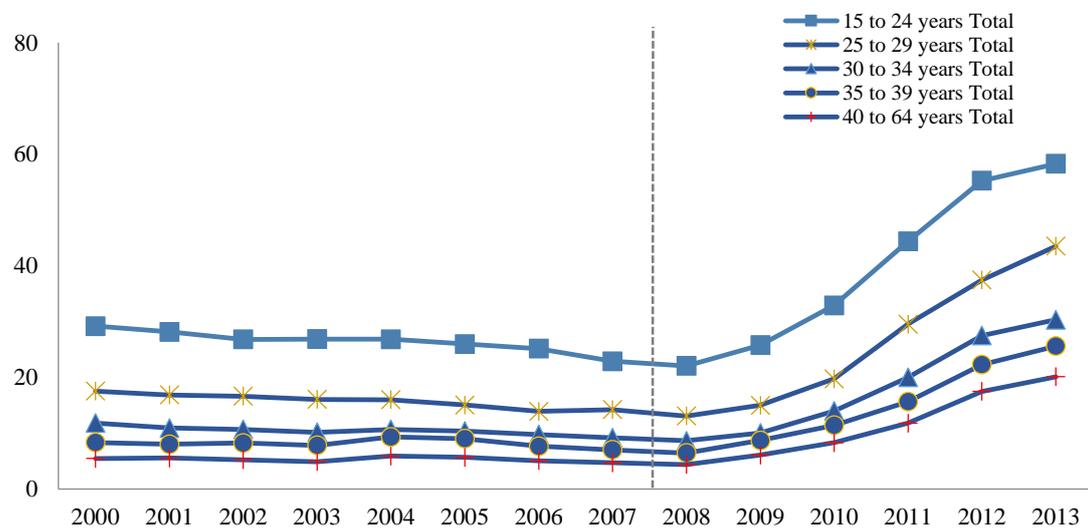
Source: Eurostat

Figure A1.6 Unemployment rate of total population by age range, in Greece



Source: Eurostat

Figure A1.7 Unemployment rate of total population by age range, in Greece



Source: Eurostat

Table A1.2 Female and male unemployment rate by age and education level (2000-2013)

		ISCED 0-2		ISCED 3-4		ISCED 5-6	
		20000	2013	20000	2013	20000	2013
Female	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
Male	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

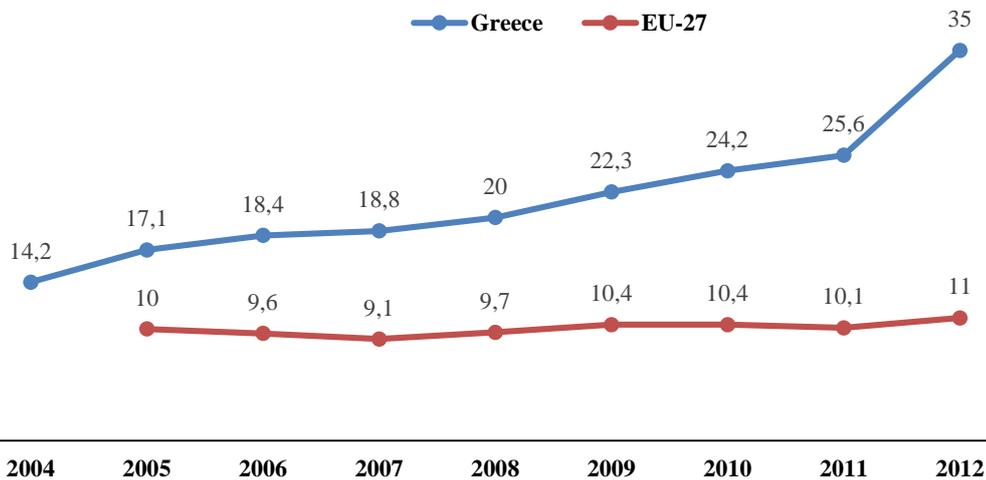
Table A1.4 At risk of poverty rate (cut-off point: 60% of median equivalised income after social transfers), in EU27 and Greece (2000-2012)

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

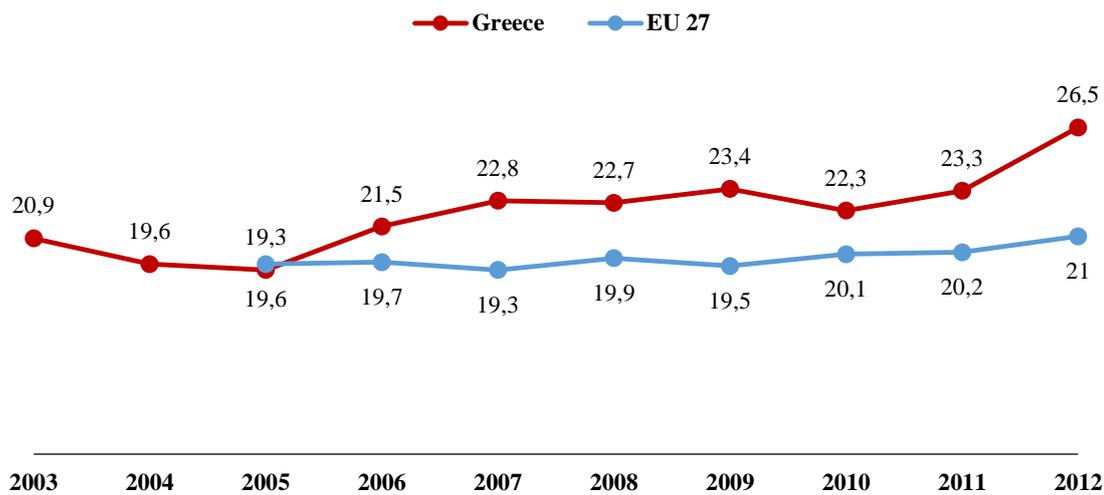
Note: : - Data not available

Figure A1.8 Inability to make ends meet in EU27 and Greece (2004-2012)



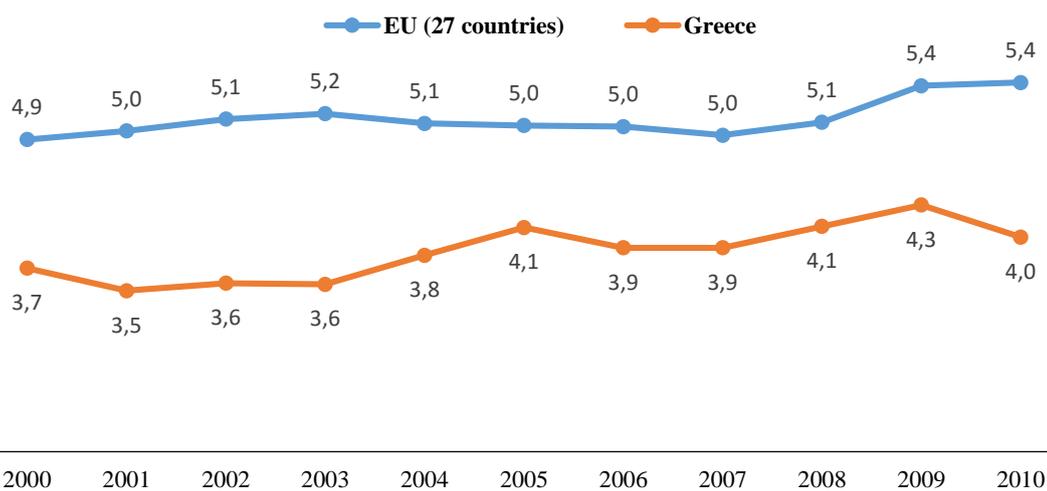
Source: Eurostat

Figure A1.9 Youth At risk of poverty rate (age less than 16 years), in EU27 and Greece (2004-2012)



Source: Eurostat

Figure A1.10 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, they 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 A.2.1).

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 figures A.2.2; A.2.3). 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) (A2.4).

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.

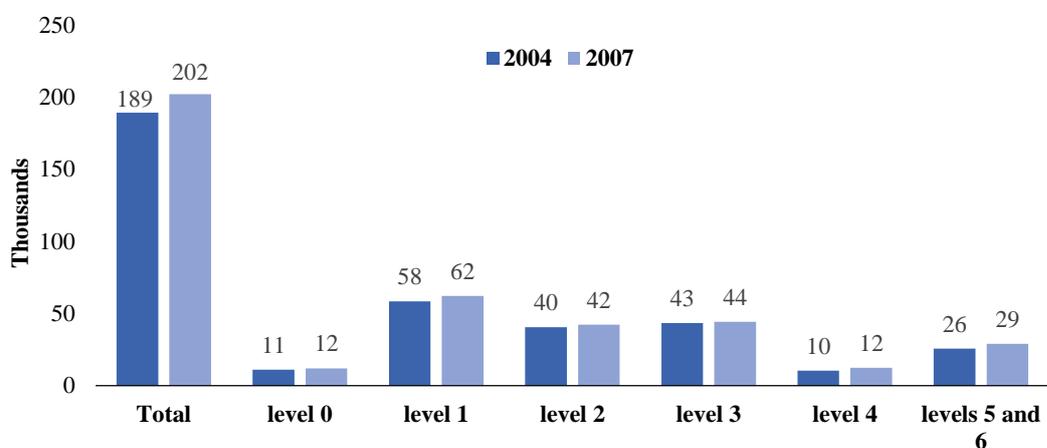
The student population that increased more than any other are at the age category of 22, 24 and 25 years old; more specifically, those aged 22 increased by 15% (from 17,8% to 42,8% in 2012); those aged 24 increased by 19% (from 7,5% to 26,2% in 2012); and those aged 26 increased by almost 15% (from 4,1% 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 (A2.4; A2.5; A2.6). 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

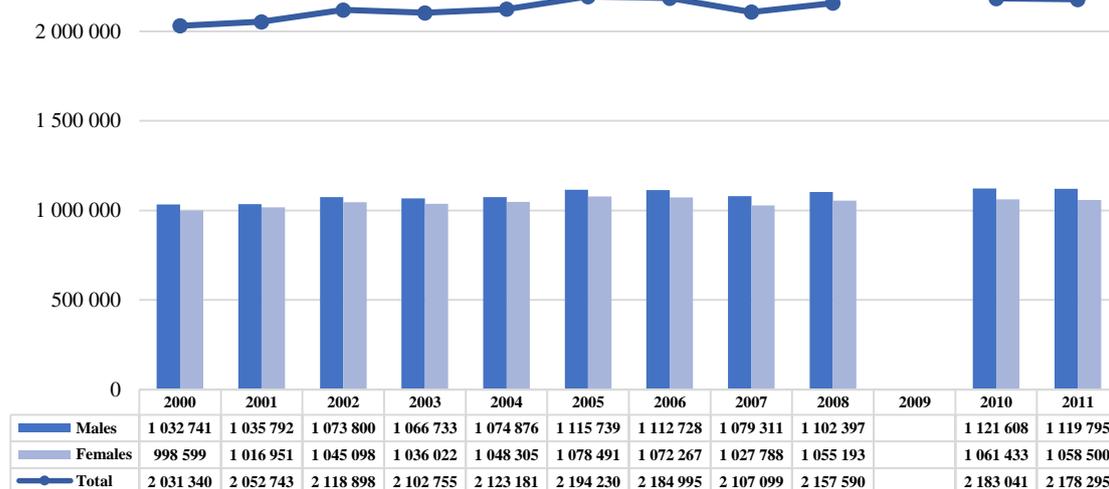
Figure A2.1 Number of teachers (ISCED 0-4) and academic staff (ISCED 5-6) by educational levels, in Greece (2004-2007)



Source: Eurostat

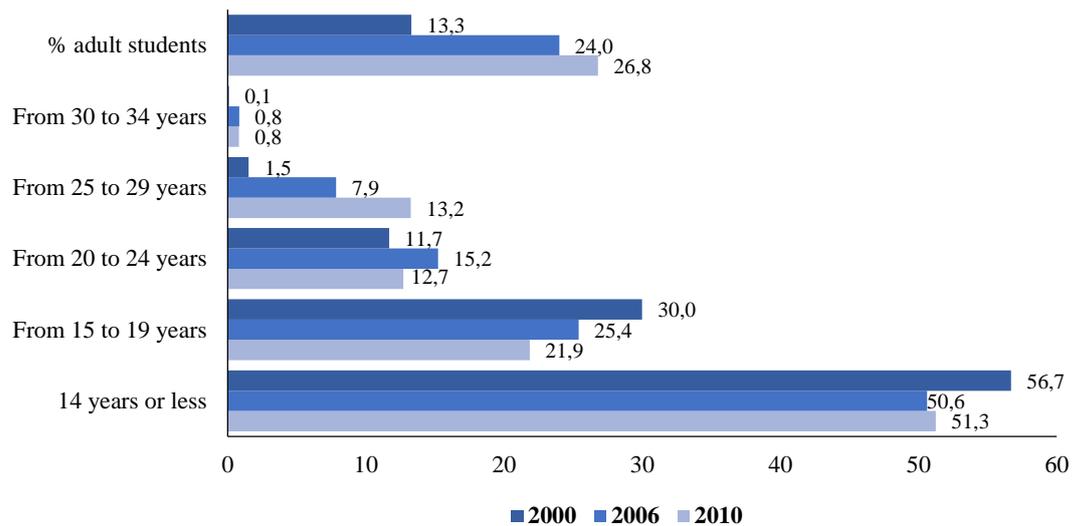
Note: Pre-primary education (level 0); Primary education or first stage of basic education (level 1); Lower secondary or second stage of basic education (level 2); Upper secondary education (level 3); Post-secondary non-tertiary education (level 4); First and second stage of tertiary education (levels 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 A2.4 Participation/enrolment by sex (15-24 years), in Greece (2000-2010)

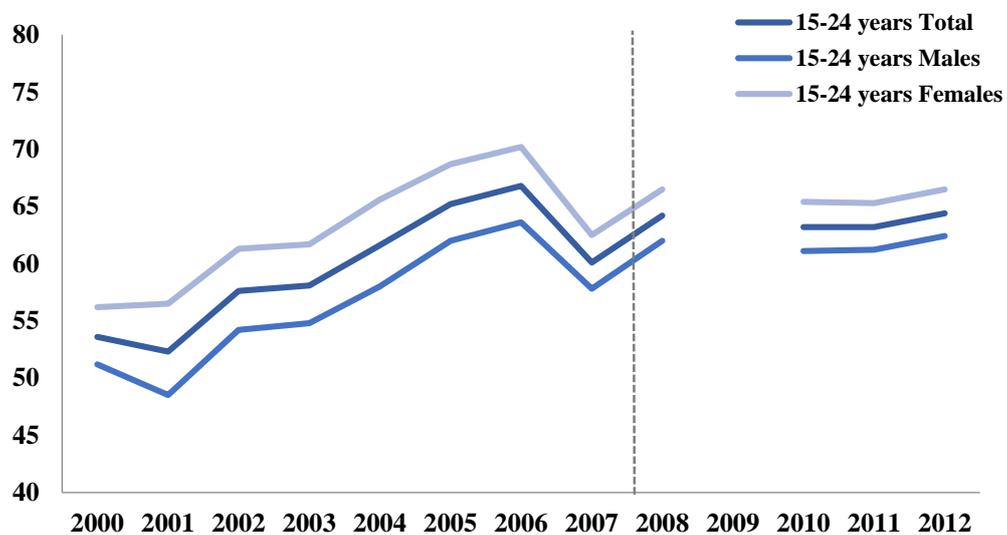
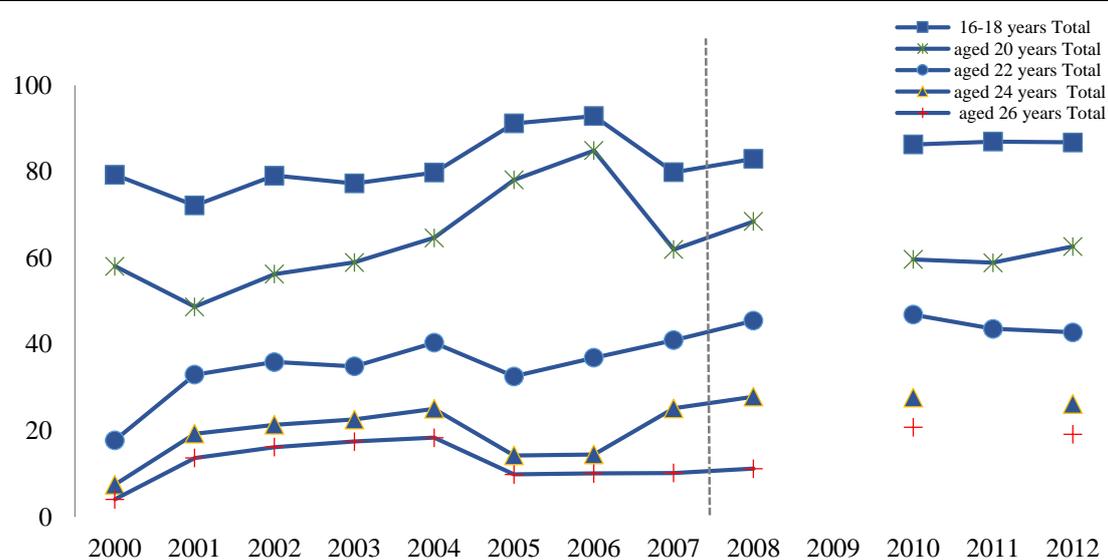


Figure A2.5 Participation/enrolment by age groups, in Greece (2000-2010)



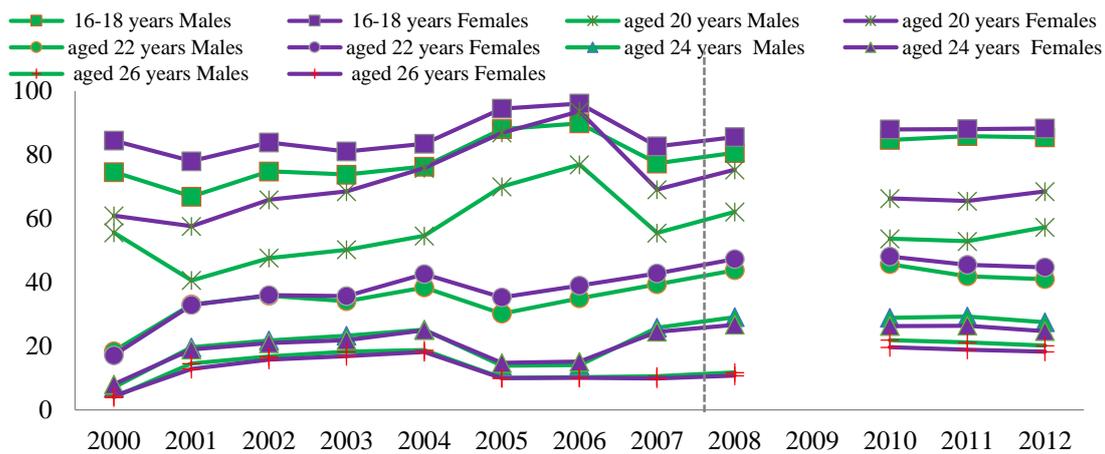
Source: Eurostat

Note: No data available for 2009

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 figure B.1.2)

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) (table B1.1)

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%) (fig. B1.3; B1.4).

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.

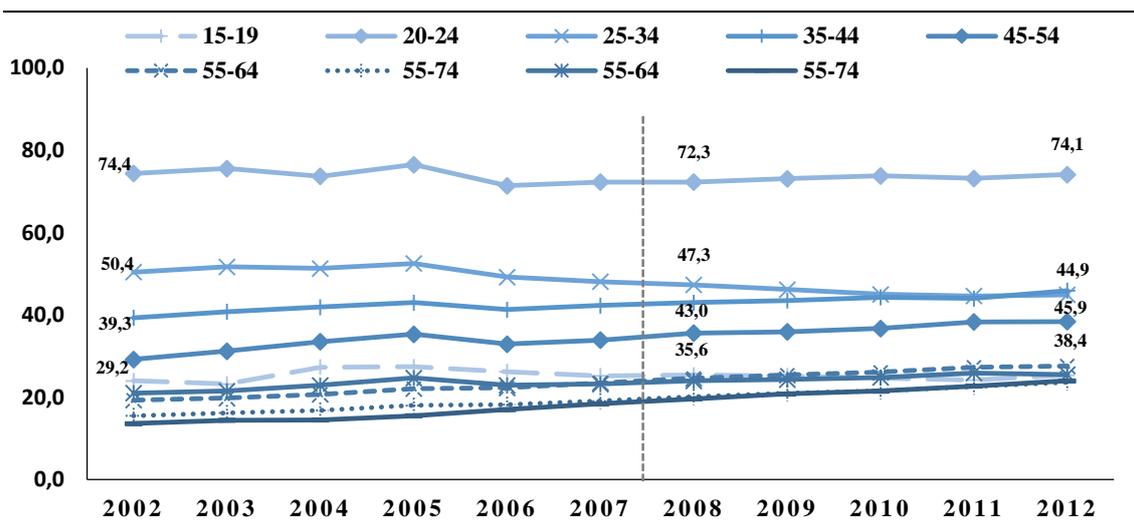
Specific national/political programmes for improving school performance

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) (B1.1).

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 (fig. B1.5).

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 (fig. B1.6).

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) (fig. B1.7).

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 (B1.8; B1.9;B1.10). 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).

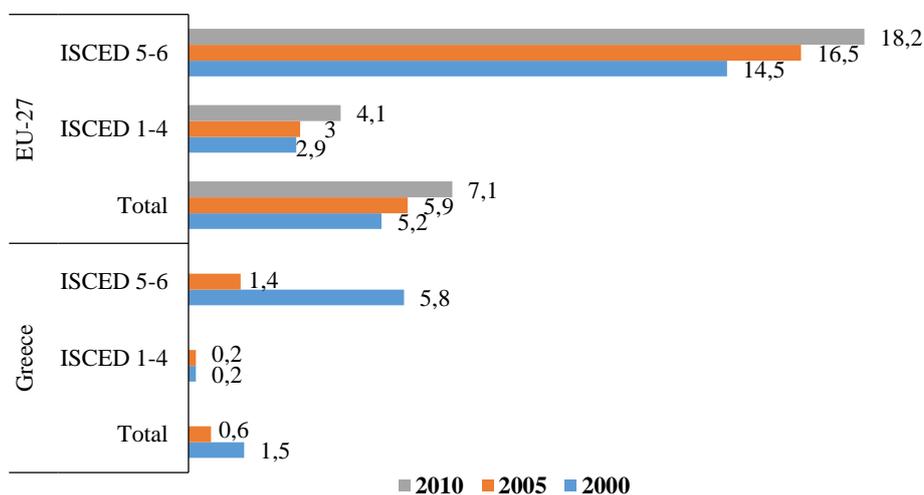
The PISA study evaluates student's competencies at mathematics and literacy. In general, Greek students do not fare well in the measures of PISA as students' performance is below average PISA standards; even more so when from 2000 to 2012 performance decreased and got lower results. It is a dubious matter 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

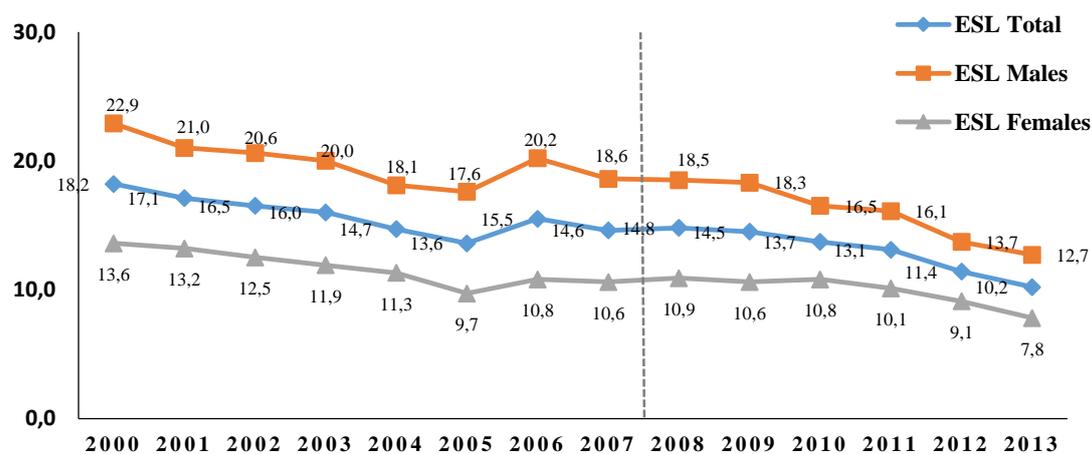
Table B1.1 - Pre-School Enrolment - Pre-primary education (level 0), % in relation to the same age total population and in relation to the same age total population

	% 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

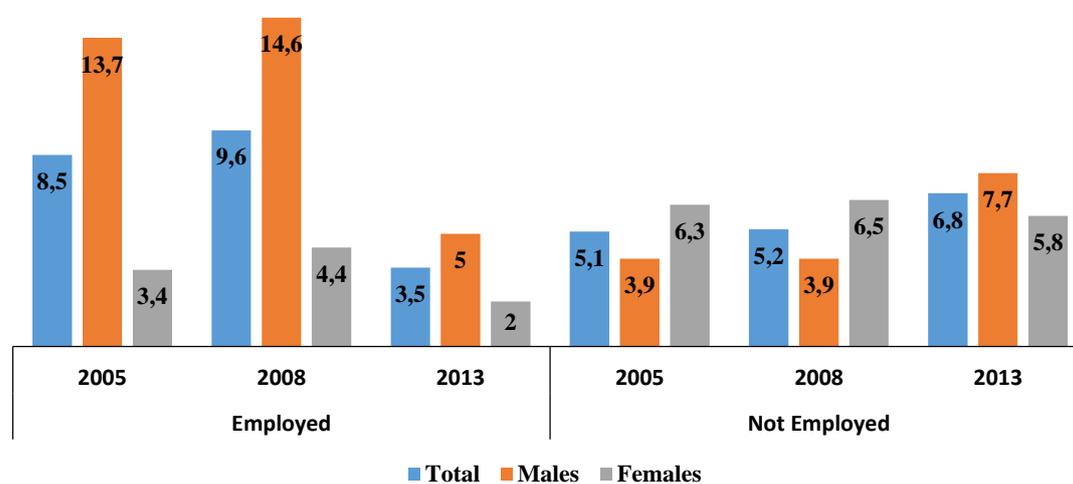
Note: : - data not available

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



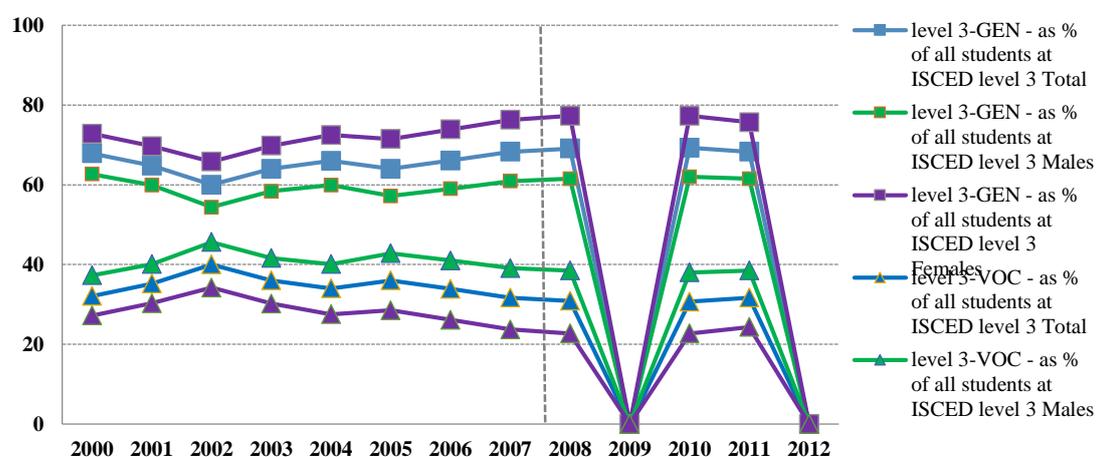
Source: Eurostat

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



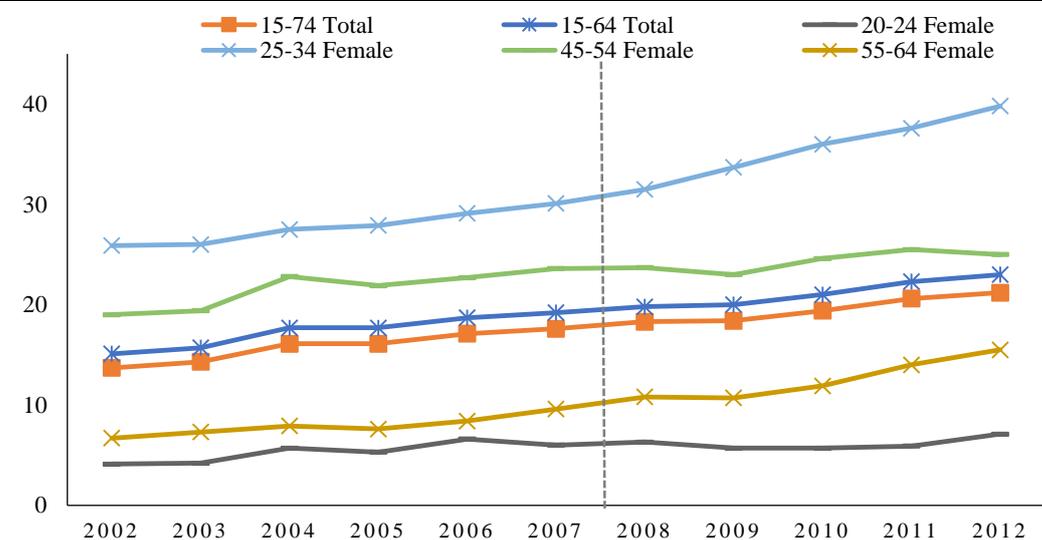
Source: Eurostat

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



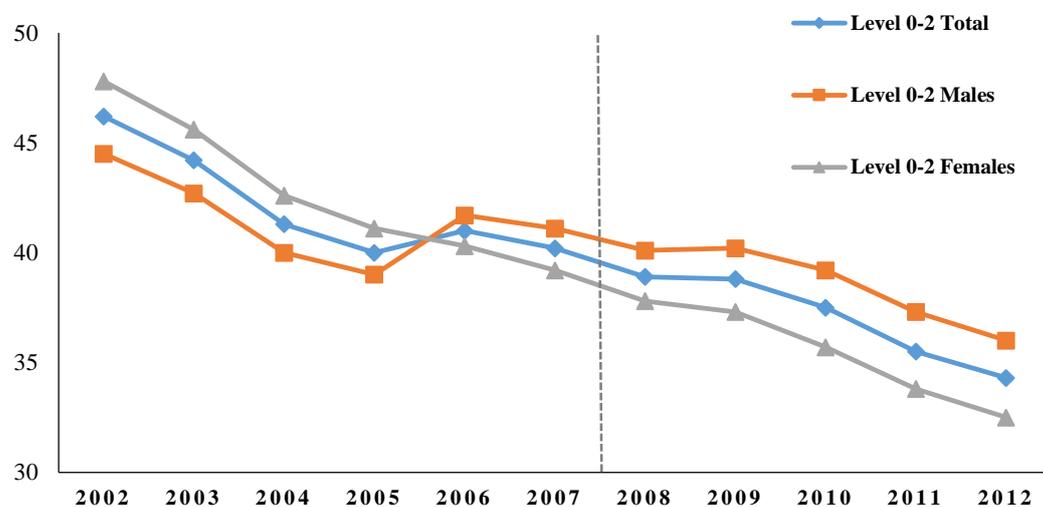
Source: Eurostat

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



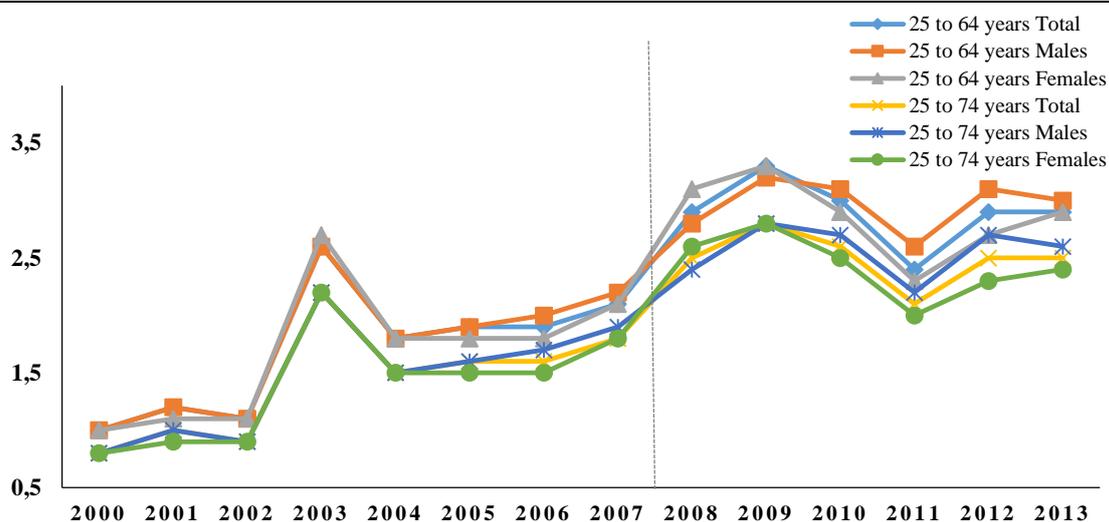
Source: Eurostat

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



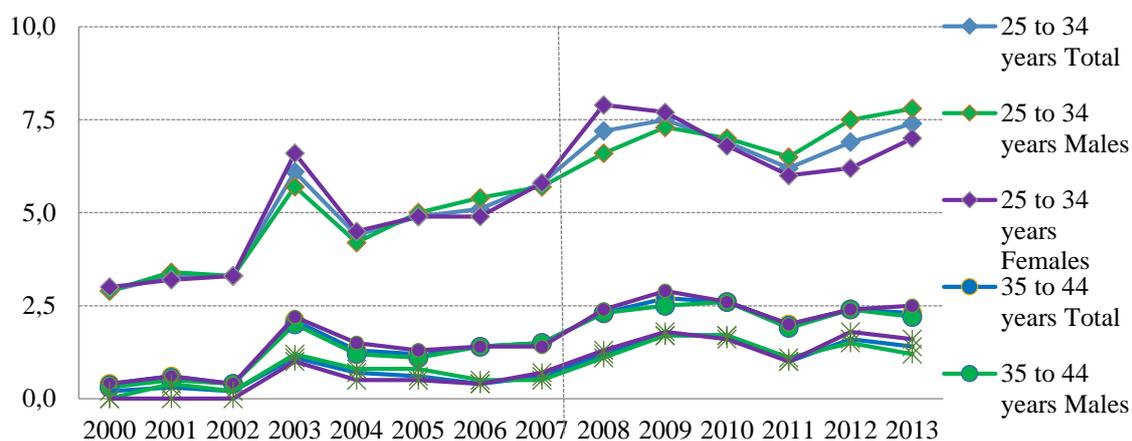
Source: Eurostat

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.

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