

Equity in Portuguese Higher Education — 1995-2005: ten years lost?

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Abstract: In this paper it will be showed the evolution of higher education in Portugal, in numbers and level of equity. For this, the national statistics will be used and it will be compared data from two national representative surveys, implemented in 1995 and 2005, to Portuguese higher education students. Starting from the evolution of the number of students enrolled in higher education, one can conclude that this level of education after the explosive growth in the last decades of the twentieth century, has been declining in recent years. Based on survey data it can be concluded that there has been a decreasing on level of equity of the system in the time period under study, which is a situation that contradicts the necessary and desired process of democratization and massification of higher education in Portugal.

Keywords: higher education, democratization, equity

Introduction

Over the last 36 years, Portugal has known a democratization process without precedents. The Democratic Revolution of April 25th in year 1974 has decisively changed Portuguese political scenario: from a dictatorial situation, where a political police would silence oppositions or deviations, even in the context of the regime, we pass on to a Portugal that respects human rights and safeguards individuals' freedom and guaranties. The changes occurred in business, educational and social contexts of the country were incommensurables. If it is true that all globalization process and worldwide economics has dragged changes in all countries and, therefore, also in Portugal, it is also true that, beyond those changes imposed by the outside, the country has made its own particular way in the path of democracy, since 1974.

The consolidation of the democratic regime has brought Portuguese people absolutely undeniable benefits and of a scope never before experienced in all domains of everyday life. Beyond the conquest of fundamental freedoms like freedom of speech and association or rights like

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the right to work, health and education, with the opening to democracy, those benefits, tangible and concrete, have diversified. Just as an example, we remember that social support was born and multiplied. A great amount of money is applied on the uncountable procedures of social support to youngsters, seniors, unemployed, future parents, etc. In health domain the National Health Service was created, and occupies the seventh place in the best health service of the world, directed to all country's residents and with a national coverage. In social security domain, we are overwhelmed by the weight of reforms, insertion revenues, unemployment subsidy, and disability subsidy.

We could go on numbering the palpable changes occurred in the country over the last 30 years that, no doubt, came from April 25th Revolution

But, if there is a domain where numbers associated with changes are overwhelming, that domain is education. From a year to another, the number of children attending school has grown in an unbelievable way. Lots of procedures have caused those numbers. Among those procedures, we enhance the right to education that had reflexes in the implementation of compulsory schooling (6, 9, 12 years); in social supports translated in school transport and the morning meal to children of basic level; in the inclusion policies; in the creation of more vocational offers, etc. (Ministry of Education, several years).

Also visible were the effects of democratization in higher education. From less than 30,000 higher education students in the beginning of 1970, we reached over 300,000 in 1995/96 and 400,000 in 2001/02 (Ministry of Education Statistics). And, if it is a fact that the number of higher education students has been diminishing over the last years, we cannot blame democracy alone. The birth diminution also contributes for this.

The last 36 years have been, since we came out of a conservative and highly repressive dictatorship, 36 "glorious years". Although if we take in consideration all the democratic conquests that we have made, it becomes relevant to ask what are the reasons why political analysts talk about pessimism and discontentment feel by the Portuguese and the reasons why the uncountable surveys that have been made, actually denote, from citizens, that kind of feelings.

In fact, since about a dozen years, the citizens' discontentment has grown, and it seems the country is covered by a counter-current, a sort of counter-current democracy as Rosanvalon (1995) and Rosanvallón & Fitousi (1996) state, that goes against the expectations that arose from the democratization process. After all, the democratization process that brought us all those conquests, that we enjoy since 1974, and maintains it, or do we assist to an inverse way, the lost of democratic conquests and the fallen of the Providence State?

If we draw attention to the social, economical and political environment that the country has lived over the last years, transparent in workers, businessman and citizen's action and showed by the media, maybe we come to conclude that the Portuguese society is really being covered by an inverted tendency of democracy conquests.

The national Healthcare System is hardly criticized on a daily basis by medic staff, by other health workers, by patients and families, by chairmen, by politics. There are the waiting lists to get a medical consultation on public hospitals, the lack of medic staff and respective replacement by medical staff from Spain or from Cuba, etc; the lack of medical care in the interior regions; the payment of taxes in public hospitals; the public hospital's private management; the privatization of the National Health Service... Suddenly, the incontestable right to health care that the Portuguese Constitution states and guarantees, waves as a result of political procedures that reproduce the neoliberal thinking, always trying to privatize, including everything that has always been public, as long as it is profitable.

Also, the Social Security doesn't escape to this public discontentment, in result of policies that enhanced the advantages and the need to privatize the sector. Shielded by the financial problems that they have to deal with, governments reconsider the calculating formulas of the retirements' value taking it to a drastic decrease and, at the same time, encouraging individuals to invest their future in retirement savings plans and other similar instruments offered by private companies. Social Security becomes privatized, making the individual responsible for the quality of life that he shall have in the future. The conquest of a dignified retirement is threatened and quality of life of the seniors is dependent of the private social security plans.

And what happens in Education? If we look at the numbers, we will see that the school population has evolved, after the explosion, in a trended decreasing way over the last years. We know that the demographic question is the centre of this situation. Birth rates have been diminishing, as well as children in school age. But, besides the demographic question, we cannot conjure school drop out, even at a basic level, as we cannot close our eyes to the high school drop out in secondary level, result of various factors where unemployment problem remains.

And what happens in higher education? We can say that the evolution of youngsters who demand for it will be the most demonstrative primary indicator of democratization effects. If we safeguard recent years, because of the demographic question and school drop out, the demand for this school level has been explosive.

Table 1 – Evolution of higher education's students, university and polytechnic, public and private

School year	Number of students	School year	Number of students
1960/61*	24 149	2000/01	387703
1965/66*	33 972	2001/02	396601
1970/71*	49 461	2002/03	395478
1975/76*	70 912	2003/04	388724
1980/81	82 428	2004/05	380937
1986/87	116 291	2005/06	367312
1990/91	186 780	2006/07	366729
1995/96	313795	2007/08	376917
1999/00	373745	2008/09	373002

Source: Portuguese Ministry of Education – Higher Education Department (GPEARI-OCES) – Statistical and Indicators Services Direction from 1990/1991 to 2008/2009

*Barreto *et alii*, *A Situação Social em Portugal, 1960-1995*

Definitely, the demand for higher education is one of the democratization conquests that weren't lost. The real schooling rate of youngsters between the ages 18-22 years in higher education has grown, according to data from GEP-ME, from 6-7% in 1973/74, to 23% in school year 2003/04. It was a remarkable significant growth, although that participation is much lesser than the one verified in the generality of our UE partners.

If... The truth is that there is always an if. And, in this case, the big if lies in the following question: being a fact that the higher education's democratization process over the last 30 years, observable by the number of youngsters that attend to this educational sub-system, from this process came out a structural change of the youngsters' social and economic composition that attend higher education or does it represent or maintain an higher education that is elitist and a social inequalities reproducer? In other words, is higher education contributing to the creation of a new social order, fairer and equitative or, on the contrary, reproduces previous inequalities, displacing it from basic and secondary levels to higher education?

To approach higher education from this point of view is to ask: who are the parents of higher education students? Who are the parents of the students that attend the various higher education courses?

These questions close the thesis that I departure to do this communication:

1 – Higher Education doesn't represent, in an equitative way, the Portuguese population, i.e., the

various social groups that compose the country's population are not represented, in a homologous way, in the student population;

- 2 - Higher Education attendance, namely to specific courses, is "closed" because of economic and social reasons, to certain groups of student population;
- 3 - Higher Education, in spite its democratization over the last 30 years, is still an elitist education, producer and reproducer of inequalities.

Obviously, these questions underlie distrust in what comes to higher education democratization process that is urgent to present. In this sense, I used the data obtained by two researchers in their PhD thesis, Belmiro Cabrito (2002) and Luísa Cerdeira (2008), concerning years 1995 and 2005, respectively.

These researchers applied a questionnaire, previously tested, to a representative sample of higher education students in Portugal, that has reached all Portuguese universities (public and private ones). In spite the differences in the two questionnaires, both have similar questions that allow a comparison between the data obtained in the both years. In the context of this research, the data selected is the one that based the present thesis.

In both researches, samples were determined in function of various variables, namely the private or public nature of the higher education institution; the institution; the course; the gender; and, students' age.

1. Social origins of higher education students

1.1 Two methodological notes

Before we analyse some numbers concerning the social structure of higher education' students, I would like to point out that, in the context of a research in Economy of Education, a population framing in a class typology plays an instrumental fundamental role, by the influence that social and economic origin can play in the school path or professional expectations of the individuals, as well as measuring the equity degree in educational system.

In the context of this communication, I only cared to "measure" the degree of equity in what concerns the education of Portuguese population that consecrates in its Constitution the right of all to education, in any school level.

In that sense, I included higher education students that were questioned in 1995, as well as the Portuguese population from 2001 Census (INE, 2001), in a class typology, adopted from the J. Ferreira de Almeida et alii (1988) proposal. In choosing this typology it was a determinant fact that the authors took in consideration, to the position of the class of the domestic groups, the portion of the class where individuals of both sexes belong. To determine the class positions, I mobilize, like the authors did, the individuals' job, and their situation towards the job.

In the context of the economy of the research, translated in the possibility to constitute family

ensembles that can be treated statistically in an autonomous way, I must enhance that I reduced the number of class portions, departing from some adaptations from the original typology.

Afterwards, and because Luísa Cerdeira's research was based in a class typology considering the family incomes, I readapted the social distribution of the Portuguese population in 2001 and the higher education population in 1995, in order to be able to compare those populations with the results obtained by Dra Luísa Cerdeira (2005). In this way, I regrouped the 1995 Portuguese population and higher education students, according to "High family income/medium high; medium low" typology.

Another note, before the numbers' presentation, concerns the fact that I will compare the "social class" that 1995 and 2005 higher education students belong to, with the homologous structure of the Portuguese population in 2001. This means that I will compare higher education students' social composition with the Portuguese population social composition from a different year. This option is justified by two situations that conditioned the investigation: on one hand, because there is no global data available concerning Portuguese population, except in Census years (in this case, the 2001 Census); on the other hand, because the population social structure is not a rapid change variable, taking into account all social, economic, demographic, cultural and political factors that condition it, and so I assume that the social structure of Portuguese population in 2001 wouldn't be very far away from the ones concerning 1995 and 2005 years, which constitutes a central year.

Naturally, and in spite this presumption, this situation adds extra care to the analysis that might come out.

1.2 Social origin of Higher Education students and Higher Education degree of equity

Let's look at Table 2, Portuguese population social structure in 2001 and higher education students' social structure in 1995 and 2005.

Table 2 – Social Composition of Portuguese population and higher education students (%)

	Population (*)	Higher education population (**)	
Incoming	2001	1995	2005
High and medium high	9,9	17,6	17,7
Medium	52,1	69,9	73,8
Low	38,0	12,5	8,5
(*) Distribution performed by the author, departing from INE data – 2001 Census (**) Distribution performed by the author, departing from the questionnaires' data applied to higher education students by the author (year 1995) and by Luísa Cerdeira (year 2005).			

The table data analysis, allows us to withdraw, two major conclusions:

1 – The degree of equity of Portuguese higher education, measured by the representation of each Portuguese population social group in higher education students, is quite low, which sends us to an elitist higher education (Bourdieu & Passeron, 1964, 1970; Prost, 1992). In fact, and in spite of the enlargement of the social recruitment base of higher education students that occurred in the last 30 years, the social strata with higher incomes are over represented in higher education population, in prejudice of the low-income group. Also, the percentage of students coming from less favored strata of the population is, in 2005, less than the quarter part of the homologous numbers in Portuguese population. Naturally, the situation in the two dates is completely different from the existing in 1974. However there is a tendency for elitism in Portuguese higher education.

2 – In evolutionary terms, the elitism of Portuguese higher education has aggravated during the ten years in study. Contrarily to what was expected, or at list, desirable, an even more equalitarian participation of the population various social strata in a democratic higher education, it was registered, in 1995 and 2005, a strong setback in the participation of individuals coming from less-income social strata in higher education in advantage of the ones coming from medium-income families.

Considering the particularity of the higher education institutions' juridical nature that, since 1986, can be public or private, I distributed higher education students by the two types of institutions, in the years in analysis. Let's look at table 3.

Table 3 – Social composition of private and public higher education students (%)

Incoming	Portuguese population 2001	1995		2005	
		Public HE students	Private HE students	Public HE students	Private HE students
High and medium high	9,9	14,4	26,4	16,2	21,2
Medium	52,1	71,8	64,3	75,5	69,0
Low	38,0	13,8	9,3	8,2	8,5

The analysis of the table numbers well demonstrates the elitism in Portuguese higher education, regardless its public or private nature. However, two new observations are possible: on one hand, public higher education always has a higher degree of equity; on the other hand, in relative terms and throughout the decade, public

higher education has become more elitist, whereas private higher education has known an inverse tendency.

Taking into account the fact that: i) public higher education serves the population and because of that, it should respond to the needs of a population (Weale, 1996; Wolfe et al., 1997); ii) the weight of public higher education in all higher education, and iii) the minor degree of equity in private higher education; in spite the tendency registered, we cannot say that throughout the decade, higher education has become more democratic. On the contrary, the numbers show, undoubtedly, years of “withdrawal” in the higher education democratization process in Portugal.

1.3 Social origin of Higher Education students', by scientific area of study

Before the stand that Portuguese higher education is an elitist higher education, we searched for other indicators/characteristics of the higher education population that could corroborate it in some way.

In order to do so, and with similar methodology, I characterized the social origin of higher education students by scientific area, in order to understand how far Prost (1992) statements could be applied to the Portuguese case, when he refers that school democratization, instead of diminishing inequalities, only transferred it from basic and secondary levels to higher education.

This affectation of sets of individuals to specific scientific domains, allowed me to verify which different scientific areas were chosen by sets of individuals of different social origins, in such a way that some scientific areas accuse an equity degree quite inferior than others.

So, in the 1995 research, it was observed that student population that attended the courses generically designated by Humanities (Philosophy, History, Geography, Language and Literature) was the one closest, in social terms, of the Portuguese population. In the inverse situation, we could find the population that attended courses usually associated to more prestigious situations and/or wealth, namely, Earth Sciences, Law, Pharmacy, Architecture and Medicine. In the between situations we found “younger” courses, which attract less specific population like Economy, Management, Biology, Engineering.

In this research, it was possible to understand in what way higher education for some, the ones that, in general, look for degrees with a professional future connected with teaching, represented a social “jump”; whereas to others, higher education represented nothing else than the continuity of an almost patrimonial heritage, i.e., configured a demand for higher education that allow to inherit surgeries and costumers, as if it was a real estate property.

Now, the question I posed was the following: I wonder if, ten years passed, this situation has changed?

In that sense, the 1995 higher education students' population by scientific area was compared with the same population in 2005. Because of the way each researcher has distributed higher education population by scientific areas, we only show situations that present total similarity.

Let's look at table 4:

Table 4 – Social origin of Higher Education students' by scientific area of study

	1995			2005		
	High and medium high	Medium	Low	High and medium high	Medium	Low
Medicine	34,1	63,4	2,5	23,9	63,0	13,1
Engineering	21,2	58,9	19,9	9,9	83,3	6,8
Economy and Management	30,6	53,8	15,6	9,4	82,9	7,7
Sciences	20,4	61,8	17,8	11,5	80,3	8,2
Humanities	12,7	64,4	22,9	14,3	73,6	12,1
Total	17,6	69,9	12,5	17,7	73,8	8,5

Considering the students social composition in some scientific areas, in both years, we can state that: i) during the decade in analysis, except for the Medicine course, the weight of students coming from less favored strata of the population, has diminished; ii) similar evolution happened with students coming from more favored strata, that diminished its weight in all courses, except for Humanities' students; iii) in spite the increase of the low incoming population in the Medicine course, it is still a highly elitist course; iv) the weight of medium income students has increased throughout the decade in all courses.

This data weakens previous statements: a decade passed and the Portuguese higher education is still an elitist higher education. However, we have to mediate this statement by the fact that "medium class" has increased significantly its participation in higher education. i.e., the weight of the "fringes" (less and more favored strata) has diminished in advantage of students that come from medium income families that appear very over represented between higher education students (73,8%), considering its weight in the Portuguese population (52,1% in 2001). This means that, in spite the growing evolution of students coming from medium income families in higher education, it still remains highly elitist.

2. Social origin of fellowship students

2.1 Fellowship Students

Another indicator that may contribute to enlighten the question of Portuguese higher education

elitism is the weight of fellowship students in the total of higher education students, departing from the fact that fellowship students can be found, in general, between the students with bigger economic deficiencies.

Table 5 – Number and percentage of fellowship students in 1995 and 2005

	1995		2005	
	Nº	%	Nº	%
Public universities	342	23	136	33
Private universities	7	1	15	13
Total	349	17	151	28

The data analysis shows that a significative increase of the percentage of fellowship students in the total of higher education students has occurred. Effectively, that number, in percent, passed from 17% in 1995 to 28% in 2005. This fact appears to locate, definitively in counter-current, with the previous evidences, in the sense that the increase of percentage of fellowship individuals shall translate a reinforcement of equity in this educational sector.

However, the increase of the percentage of fellowship students was due, fundamentally, to private higher education students and it is, certainly, a direct consequence of the extension of social action services to private higher education institutes in the beginning of this century, and that has reached, obviously, students coming from less favored social strata that attend private higher education institutions. In conformity, it will be possible to understand the increase of fellowship students throughout the ten years in study, in consequence of new educational policies, without increasing the equity degree in higher education, because the new fellowship students were already inserted in the system, without the scholarship.

Obviously, the educational policy of extending social action to private higher education was a very positive factor in the context of higher education and can be passed, in medium term, to an increase of the equity in our higher education because it guarantees, to a bigger number of low incoming individuals, the possibility to attend higher education.

2.2 Fellowship students by scientific area of study

Meanwhile, let's see the distribution of fellowship students by scientific area, in both dates.

Table 6 – Fellowship students by scientific area of study (%)

	1995	2005
Humanities	24,6	35,0
Law and Social Sciences	12,8	31,8
Sciences	14,9	31,1
Engineering	23,4	29,9
Medicine – 1,2 Pharmacy –1,8	3,0	27,7
Economy and Management	12,0	34,4
Total	17,0	28,0

The table analysis allows some interesting considerations:

- first, the data translates an evolution of fellowship students that, more than representing the extension of the recruitment base of higher education in advantage of less income individuals, can work out, as referred previously, in the extension of social action to private higher education;
- in both dates the major number of fellowship students attended, generally, courses associated with less incomes, supporting previous statements;
- finally, and probably, the most interesting conclusion, the number of fellowship students has had a significant increase between the Medicine and Pharmacy students, fact that points out a democratization tendency of Portuguese higher education, specially if we remind that the Medicine course is only available in public higher education.

3. Public (State) and private (students and/or families) costs in public higher education

At last, we will show the costs that public higher education students have to perform in order to attend higher education and those costs supported by the State to offer a place in higher education.

I decided to use this indicator because the financing questions are the ones that, nowadays, condition more higher education' supply and demand. From the demand side, we know that one of the obstacles to higher education attendance is related to the financial capacity of the students or families to assume the necessary expenses. Students support policies, as scholarships, subsidies or special credit procedures are among the factors that minimize the difficulties of more needed students in attending higher education.

On the other hand, on the State side, it is compulsory to elaborate a double analysis. On one

hand, before the difficulty of state budget to respond to growing social needs, States have come to adopt political procedures that transfer to the user part of the costs necessary to the consumption of public goods. The implementation, since 1992, of fees in public higher education, for instance, configures the principle of privatization of this school level when transferring to the students the responsibility to finance a service of public nature.

On the other hand, before the social return that higher education brings to community, taking into account the European tradition of seeing education as a public nature good and considering the Portuguese Republic Constitution, it would be expectable an increasing State participation in financing public school. Was this what happen in the decade in analysis?

To assess the State and the families' participation in financing public higher education, we will show the public and private costs of higher education (Jonhstone, 1986, 2004), i.e., the costs that students and/or families are forced to do to attend higher education (life costs and educational costs) and the costs that States have to guarantee a place in higher education.

Table 7 – Public (State) and private (families) costs of public higher education, in euro and percentage

	Euro			%	
	State	Students	Total	State	Students
1994/95	3140	4003	7143	44,0	56,0
2004/05	4439	5505	9944	44,6	55,4

A more superficial analysis of the table numbers allows stating that the costs of the two partners in financing public higher education has known a positive evolution. However, when that participation is measured in percentage terms, it's understandable an increase of the participation of the State and consequent diminishing of students and/or families participation. Nevertheless, the change was so small (0, 6%) that is licit to affirm that, in the end of these ten years, the participation of students and families in financing education is still quite superior to the State participation (circa more than 12%), and there are no signs in the way of an increased participation of the State and, consequently, to provide a public service to all population.

Final considerations

This communication was entitled "1995-2005: ten years lost?" The main goal was to understand the evolution of higher education in Portugal, in terms of dimension, participation groups and income streams, in order to understand the democratization level of Portuguese higher education, public and private sectors.

With that goal in mind, the information concerning social origins was measured in income terms, of the Portuguese population, as well as student population, in 1995 and 2005, segmented by scientific area of study and by State and Family participation on the financing of public higher education

The analysis of the information, in spite the contradictory situations, cannot stand statements that assume an increase in equity's degree in higher education on the period in analysis.

As a matter of fact, it was possible to verify that the percentage of youngsters attending higher education that belong to less favored strata of the population has diminished in a significant way, whereas the percentage of youngsters belonging to medium income families has increased in a substantial way.

On the other hand, it was also possible to verify that students, fellowship and non fellowship, are distributed along the various scientific areas in function of their income level, which allows us to state that some scientific areas are attended by students of specific social origins, although an original democratization case has appeared: Medicine and Pharmacy.

Finally, it was possible to understand that the State still contributes with a minor parcel to finance higher education costs, and that financing is, in major percentage, students or families' responsibility.

From the exposed above we cannot assume a positive attitude in what concerns the increase of the equity degree in higher education, in Portugal. On the contrary, in general terms, that degree has diminished over that period. All along these ten years, Portuguese Higher Education system turn itself in a more and more inequity system.

How is it possible to overcome this situation? This is a question that needs answers and resolution. Obviously, the answer to this problem lies in a set of political procedures. Effectively, before the present situation, it is necessary that:

- The percentage of students from less favored strata grows in higher education, which implies an effort in order to increase the percentage of poor secondary students goes to university;
- Each scientific area of study is equally available to all candidates;
- The financial effort performed by students and/or families in order to access and maintain a youngster in higher education diminishes;
- The social support increases to all students;
- The expenses with the costs of education (current costs plus the expenses directly associated with fees, tuition fees, books and other school material) diminish on the student side and grow complementarily on the State side.

So, the future of Portuguese Higher Education should be set on diminishing students' expenses, regardless the respective income levels and the private or public nature of higher education

institutions and increase the financing on the State side; allied to procedures to increase the number of individuals between 18-22 years in higher education. To accomplish it, it would be necessary to implement political and pedagogical procedures that would allow increasing the attendance and the efficiency in higher education, as well as its equity degree. The so called justice and social cohesion that all countries proclaim the desire to ascend, namely Portugal and its partners from European Union demand a new (old) way to be government that acts in the way of dignity, previously guaranteed, taking the hand to the tax system, fighting against corruption. Only a fair tax system with no corruption would bring to the States the money needed to go on with social justice and equity efforts.

Unfortunately, recent experience of Portuguese governments didn't allow me to have good expectations regarding Higher Education degree of equity. In fact, last years Portuguese population faced to the diminishing participation of State on education expenses (and not only on higher education); the increasing of families expenses in their children' education; the diminishing of the number of students enrolled on Higher Education; the diminishing of families' income; the increase of the number of the "corruption cases".

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