

ECSE International Report

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

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Contents

Introduction	9
National Education Agendas and Process of Europeanization.....	10
Dynamics convergence of southern Europe in schooling and educational outcomes	12
Financial constraints the educational ideology: what changed education in Southern Europe during the Crisis?	16
The ECSE report	20
Chapter 1 Objectives and Methodology	22
Chapter 2. A comparative approach: Southern Europe characterization. Context and Educational Systems.	35
2.1. <i>Crisis on Europe's southern countries</i>	37
2.2 <i>Qualification and employment</i>	43
2.3 <i>Southern Europe's educational systems</i>	58
Chapter 3. The “education quality” policies in Southern Europe and its impacts over teachers’ and students’ lives	93
3.1 <i>Students’ competences assessment</i>	97
3.2 <i>Teachers evaluation</i>	103
3.3 <i>School evaluation</i>	106
Chapter 4. Equity and education: public policies and their results in Southern Europe. 111	
4.1 <i>Education: participation and access</i>	117
4.2 <i>Access Pre-Schooling/ Pre-Primary</i>	125
4.3 <i>Adults education</i>	127
4.4 <i>School’s diversity - Special Education</i>	139
4.5 <i>Success, performances and fragilities in Southern Europe</i>	150
4.6 <i>Strategies for promoting success and equity</i>	163
4.7 <i>Dynamics on Education expenditure and funding</i>	167
Chapter 5- Equity in times of crisis and Political Choices	181
5.1 <i>Tendencies in Southern Europe: Convergence within a context of Globalization and Europeanization</i>	181
5.2 <i>Convergence and Southern European’s countries educational results</i>	185
5.3 <i>Political cycles and educational policy-making</i>	190
Conclusion	208
References	212

Content of figures and tables

Chapter 1 Objectives and Methodology

Table 1. Variables, dimensions and indicators.

Chapter 2. A comparative approach: Southern Europe characterization. Context and Educational Systems.

Figures

Figure 2.1.1 Evolution of real growth rates of GDP and unemployment in Greece, Spain, Italy and Portugal (%), between 2003 and 2014

Figure 2.1.2 Evolution of educational attainment (%), by ISCED, 25-64 years, between 2000, 2008 and 2013, in Greece, Spain, Italy, Portugal and EU-27.

Figure 2.1.3 Evolution of the employment and unemployment rate (%), pop. age 25-64 years, between 2000 and 2013, in Greece, Spain, Italy, Portugal and European Union 27

Figure 2.1.4 Trends in the Gini coefficient in the south European countries (2003-2012).

Figure 2.1.5 People at risk of poverty (60% of median equivalised income after social transfers) and income inequality (Gini coefficient), EU-28, 2012

Figure 2.1.6 Youth neither in employment nor in education and training (NEET) rate, age group 15-24 and income inequality (S80/S20), in EU-28, in 2012

Figure 2.1.7 Annual expenditure on public and private educational institutions compared to GDP per capita

Figure 2.1.8 Public Expenditure on Education, as % GDP

Figure 2.1.9 Private expenditure on education, as % GDP

Figure 2.1.10 Financial aid to pupils and students as % of total public expenditure on education

Figure 2.1.2a Evolution of educational attainment (%), by ISCED and age (25-64 years), between 2000 and 2013, in Portugal, Spain, Italy and Greece.

Figure 2.1.6a Evolution of the employment and unemployment rate (%), by age groups and ISCED, between 2000 and 2013, in Portugal, Spain, Italy and Greece.

Figure 2.2.1 Number of student's evolution in Portugal, Spain, Italy and Greece, by level of education, between 2000 and 2012.

Figure 2.2.2 Participation/ enrolment in education of students between primary (ISCED 1) and tertiary education (ISCED 6), as % of corresponding age population (15 to 24 years old).

Figure 2.2.3 Number of teachers and academic staff evolution, by ISCED levels, in Portugal, Spain, Italy and Greece, between 2000 and 2012

Figure 2.2.4 Financial support for special education (in EUR, mainland Portugal (2009-2014))

Figure 2.2.5 Evolution of the number of students with SEN, by cycles and levels of education, Mainland Portugal (2009-2014)

Figure 2.2.5 Percentage of students with disability per level and scholastic year (2001/02-2013/14)

Figure 2.2.6 Percentage of adult students in total, in Portugal, Spain, Italy and Greece, 2000-2012

Figure 2.2.1a Participation/ enrolment in education of students between primary (ISCED 1) and tertiary education (ISCED 6), as % of corresponding age population, by age group.

Figure 2.2.2.b Participation/ enrolment in education of students between primary (ISCED 1) and tertiary education (ISCED 6), as % of corresponding age population, by sex.

Figure 2.2.2b. Participation/ enrolment in education of students in primary education (ISCED 1), as % of corresponding age population.

Figure 2.2.2c. Participation/ enrolment in education of students in primary education (ISCED 1), as % of corresponding age population.

Figure 2.2.2d. Participation/ enrolment in education of students in upper secondary (ISCED 3), as % of corresponding age population.

Figure 2.2.2e Participation/ enrolment in education of students in post-secondary education (ISCED 4), as % of corresponding age population.

Figure 2.2.2f Participation/ enrolment in education of students in tertiary education (ISCED 5&6), as % of corresponding age population.

Figure 2.2.6a. Evolution between 2000 and 2012, of the number of adults studding in Portugal, according to age groups.

Figure 2.2.6b. Evolution between 2000 and 2012, of the number of adults studding in Spain, according to age groups.

Figure 2.2.6c. Evolution between 2000 and 2012, of the number of adults studding in Italy, according to age groups.

Figure 2.2.2d. Evolution between 2000 and 2012, of the number of adults studding in post-secondary in Portugal, Italy and Greece, according to age groups.

Figure 2.2.2e Evolution between 2000 and 2012, of the number of adults studding in tertiary education (ISCED 5&6) in Portugal, Spain, Italy and Greece, according to age groups.

Tables

Table 2.1.1 risk of poverty rate, according to age group, in the southern countries of Europe, 2004-2013

Table 2.2.1 Number of teachers and academic staff evolution in Portugal, Spain, Italy and Greece

Table 2.2.2 Number of Resource Centres for Inclusion, supported organizational units and number of students with SEN covered

Table 2.2.3 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

Table 2.2.4 Applicants and holders (No.) of financial support (subsídio) for special education, by NUTS 2 regions, between 2009 and 2014

Table 2.2.5 Percentage of students with Special Educational Needs in Spain, in 2012-2013

Table 2.2.6 Students with disabilities per regional area and kind of dependency (2013/14), in Italy

Chapter 4 Equity and education: public policies and their results in Southern Europe

Figures

Figure 4.1 Evolution of educational attainment (%), in EU27, Greece, Spain, Italy and Portugal, between 2000-2013.

Figure 4.2 Participation/enrolment in education, of population between 15-24 years old, in EU-27, Greece, Spain, Italy and Portugal (2000-2012)

Figure 4.2.1 Participation/enrolment in education, of population between 15-24 years old, by sex, in EU-27, Greece, Spain, Italy and Portugal (2000-2012)

Figure 4.3 Participation/ Enrolment in education on Upper Secondary - General Courses and Vocational path, as % of all students at ISCED level 3

Figure 4.4 Number of student (total), between 15 and >40 years old, that enrolled in tertiary system (ISCED 5 and 6) (2000-2011)

Figure 4.5 Pre-school enrolment, between 2000 - 2012

Figure 4.6 Number of students in Lower Secondary with more than 20 years old, in Greece, Spain, Italy and Portugal, between 2002 and 2012.

Figure 4.7 Number of students in Upper Secondary, in Greece, Spain, Italy and Portugal, between 2002 and 2012.

Figure 4.8 Participation rate in education and training (last 4 weeks), for population with 25-64 years old (2000-2013).

Figure 4.9 Participation rate of adults in education and training (25-64 years), 2000-2013.

Figure 4.10 Data from NESSE (2012) regarding pupils identified as having SEN as a percentage of the total school population in selected European countries.

Figure 4.11 Percentage of students with disability per level and scholastic year (2001/02-2013/14)

Figure 4.12 Upper secondary and post-secondary non-tertiary education attainment level (%), in Greece, Spain, Italy and Portugal, between 2002 and 2012.

Figure 4.13 Percentage of population aged 25-64 below secondary attainment

Figure 4.14 Tertiary education attainment level (%), in Greece, Spain, Italy and Portugal, between 2002 and 2012.

Figure 4.15. Early school leaving (ESL), in EU27, Greece, Spain, Italy and Portugal, between 2000 and 2013.

Figure 4.16 Reading, mathematics and science literacy, in OCDE (average), Greece, Italy, Portugal and Spain, 2000-2012

Figure 4.17 Mathematics literacy (average), according to index of economic, social and cultural status (ESCS) by quartiles

Figure 4.18 Averages for mathematics, age 15 years, by Index immigration status, 2003-2012

Figure 4.19 Public Expenditure on Education, as % GDP, in Greece, Spain, Italy and Portugal, between 2000 and 2010.

Figure 6.20 Financial aid to pupils and students as % of total public expenditure on education, in Greece, Spain, Italy and Portugal, between 2000 and 2011

Figure 6.21 Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents

Tables

Table 4.1 Adults Policies and results between 2000-2013

Table 4.2 Numbers certified population at Basic Education (ISCED 1 and 2) and at secondary level (ISCED 3), in Portugal (2004-2013).

Table 4.3 Number of Resource Centres for Inclusion

Table 4.4 Applicants and holders (No.) of financial allowances for special education

Table 4.5 Students with SEN (%) in Spain, between 2012-2013

Table 4.6 Relative proportion of public and private expenditure on educational institutions by level of education 2005, 2011, 2012 – primary, secondary and pos- secondary non tertiary

Chapter 5 Equity in times of crisis and Political Choices

Figures

Figure 5.1 Population with Tertiary attainment (25-64 years old), Index 100=2000

Figure 5.2 Students within the vocational areas as a percentage of the total of students ISCED 3) Index= 1998

Figure 5.3 Students within the vocational areas as a percentage of the total of students ISCED 3) Index= 1998

Figure 5.4 PISA results in mathematics, for OCDE average, Germany, Greece, Spain, Italy, Portugal, Sweden and United Kingdom, between 2000 and 2012.

Figure 5.5 Participation rate in education and training (last 4 weeks), % total population aged 25-64, Index=2000

Figure 5.6 Southern European Constitutional Governments between 2000 and 2014

Figure 5.7 Southern European Political Cycles –Policies in Education

Figure 5.8 Southern European main policies and results

Figure 5.9 Diachronic Analyses Southern European Educational Results

Introduction

The financial crisis in 2007 in the US has rapidly evolved into a global systemic crisis with profound impacts in various regions of the world and in various economic and social sectors. For Europe, entangled in a complex process of political, economic and monetary integration, the impact of the financial crisis has highlighted a number of structural weaknesses and latent tensions, especially when it became clear the need for a single, effective response in a context of globalization of markets financial. The absence of such common answer putted in evidence the ambiguities, conflicts, resentments, selfishness and prevailing prejudices between countries and major European political families.

The neoliberal and conservative orientation of most national governments, and therefore the European institutions, meant that they adopt a rigid logic of austerity aimed at the sole purpose of supporting the financial system. We moved from a financial crisis to a broader crisis that did not solve the problem of financial sustainability, while caused, particularly in countries most affected by the crisis, a strong negative impact on social policies and, in general, as usually designated by the European social model.

The aim of this report is showing that the evolution of education indicators in southern European countries were improving and recovering for the last decades. This process was not at all uniform, neither considering the rhythm nor the factors, nor even the policy and institutional choices of each of the four countries (Portugal, Spain, Italy and Greece). The empirical evidence also shows that the EU was – in more than one way – a relevant actor in this matter, uncovering the Europeanization process that helps to explain how European orientations impacted differently the four countries (Radaelli, 2003). But it was effective until the crisis, and the European and national policies to deal with it, put an end (or at least a long break) to the process. The main question to be answered, comparing the four countries' education systems evolution, is about the trade-off between the financial constraints imposed by the austerity programs and the ideological orientations of national governments affecting the policy reforms. Did the financial crises play an important role in educational policymaking, or was this mainly the result of political choices, eventually justified by the context of the crises?

National Education Agendas and Process of Europeanization

Throughout the 1990s, a positive period for European integration, there is an evident strive for the deepening of the Union in economic and also social and political matters, strongly driven by the European Commissioner Jacques Delors. The Lisbon Summit in 2000 was the *zenith* of this trend.

In the context of a global knowledge economy and information society, one relevant dimension of the political agenda, both at the European and the UE Member States level, was the objective of school expansion and rise of qualifications. On one hand, this was supposed to increase some kind of sense of “European citizenship” that is still missing. On the other hand, it was a priority to address the problem of the skills demand, the growth of high complex jobs demanding increasing capabilities, mainly in those countries where there were persistent traces of social selectivity and poor educational quality - e.g., low level of qualifications’ structure, low levels of adults’ engagement in lifelong learning activities, high rates of early school leaving, bad results in international measuring of youngsters competencies and wide school failure - as it was the case in southern Europe. This group of countries accepted the “qualifications challenge” and the results were, as we will see, encouraging.

By 2005 the impetus for a social Europe and for the convergence of social and educational standards had cooled down. The slowdown of economic growth and the rise of liberal parties across Europe lead to a focus displacement of the social (employment and social inclusion) concerns towards economic and monetary policies. In the mid-term review of the Lisbon strategy the triangular dynamic in which it was based had become bipolar – linking employment to economic growth - and social policies left the core agenda. But southern Europe was still making its path, mainly with Portugal joining the peer countries. The 2007/2008 crises have put an end to the process. At the beginning, European Institutions decided to launch the “automatic stabilizers” and education benefited from this. But since 2010 the debts crisis promoted the budget orientation consensus to “launch automatic hard austerity programs that had particularly hardship consequences in southern Europe and Ireland. This had huge impacts in the trajectories of the southern European countries in education achievements, and reinforced the debate about the relevance of education policies in Europe.

The way in which each southern country reacted to the crisis and decided to affect education with austerity restrictions varied widely. This was expected, given that over the last decades were built different educational systems. We do not find, in fact, in this regard, any support for the defence of the existence of a typical Social State of Southern Europe (Ferrera, 2000), like other authors advocate to analyze other materials, as part of a controversy that extended to model of education

systems and their results, such as we find in Andy Green (2013, 2009, 1999). In fact, the similarities are just at the level of the image of a region with less qualified people, which is only true in some cases and less interested in qualify, which has been proving to be also a stereotype with no empirical evidence.

The qualification deficits of the population of the Southern European countries are structural attributes that are associated with historical processes that include late industrialization (albeit with many regional variations), the low levels of productivity and economic competitiveness and specialization based on intensive jobs labor, high levels of social inequality, the belated realization of universal social protection systems and the postponement of construction of educational systems with universal vocation, partly due to the extension to mid 70's conservative dictatorships, based in authoritarian states, but with underdevelopment functions. The full European integration of these countries (except for Italy, a founding member), following rupture processes with dictatorships, constituted an outright declaration of intent on their part in bringing the institutional and political as well as the levels and average standards European life, a fact that led to the reorientation of many of its historical affinities.

This desire to "Europeanization" (Featherstone & Radaelli, 2003) is exemplary when it comes to put into action national governments towards convergence, regardless of the action of the European institutions, which in education did not pass production some program guidelines, small budgets to fund certain segments of the systems (such as vocational education) and the approval of the Bologna Declaration in 1999 and the Lisbon Strategy in 2000 (Featherstone and Kazamias, 2000).

This fact definitely contributes to maintaining a high diversity of arrangements and peculiarities in education systems, as well as significant differences in their performances, since they are strongly conditioned by what has come to be called "path dependency". This diversity and disparity between European education systems is particularly relevant when comparing the educational levels of the northern, central and southern Europe.

Not aiming to discuss all modernization vectors that the Europeanisation and the convergence efforts triggered in southern Europe, we know that the effects initiated by this process led to important stimuli in the field of political orientations, the institutional frameworks and the positioning of the actors face the education systems. Moreno-Fuentes (2013) report that the phenomenon of Europeanization as referral mechanism in peripheral societies undergoing modernization, triggered almost naturally convergence processes and different paths, because some structural source data was in itself distinct. Relevant elements of this process were also made by the action of international agencies that triggered the education promotion programs

(UNICEF) or triggered performance benchmarking processes of education systems and their impact on economic competitiveness (such as the OECD and the World Bank) (Valter Lemos, 2014). Other initiatives, such as the development of European statistical systems specifically devoted to education (Eurydice) came also to highlight the need for sustained investment in reducing the educational backwardness and catch up with the European average. This evidence was also based on the theories of human capital in an increasing complexity of the context of the competitiveness of national economies in the global knowledge-based economy (Drucker, 1993).

It was therefore within a complex framework that Southern European countries were able to effectively modernize and develop their societies and the main typical political systems of Europe more developed despite having begun the process of convergence under match conditions clearly more unfavourable, since they had completed the "thirty glorious" after the end of war and the exceptional conditions for growth and social justice that Europe experienced in the period (Capucha). This was being done, at least in the field of education and skills, when the path was abruptly interrupted by the crisis.

Dynamics convergence of southern Europe in schooling and educational outcomes

Analysis of the convergence trend in the results of the Southern European countries in the field of education and qualification, takes two analytical vectors: (1) First, these countries, towards the countries of Central Europe and North America have persistent structural weaknesses in their performances. This can be checked, for example, in the most difficult of completion of compulsory schooling (Martins, Susana), or the most significant part of the workforce that exhibits lower educational qualification levels (as it will come later). (2) Secondly, the entry into the European Community influenced modernization processes of social, economic and educational structures with clear objectives to converge from the average standards of peer to reference objectives for these areas. The claim that there was a convergence of the four southern European countries with regard to the results in education and improving the performance of education systems is supported by the analysis of the four indicators relating to these qualifications in 2020: dropout rate early school; graduates rate in tertiary; rate of adults involved in education and training actions; and rate of students involved in vocational education.

A simple analysis of the labour force qualification structure (25 to 64 years) in four countries of Southern Europe into consideration in this report brings out a common structural deficit, with the predominance of the lowest educational qualifications.

In 1993 the equivalent qualifications to primary education were quite significant, especially Portugal for the highest percentage (80%), immediately followed by Spain (74.8%). Greece and Italy, who also had high percentages (60.9 % and 67.5 % respectively) both showed more encouraging results with regard to the population the equivalent of secondary education (26.1% and 25.7% respectively). Made exception to Italy a few years had passed since joining the EEC and still showed clearly the consequences of historical backwardness in educational development in these countries in the process of consolidating democracy and building the institutional complex of the education system, translated into priority given to reforms that would promote access and mass participation at the lower levels of the system, at a time when the north and centre of Europe educational priorities had already been reoriented to the massification of higher levels of education.

The efforts made by countries of the South in 2003 allowed important part of starting delay had been recovered and may be identified rapid growth of the percentage of the population with secondary education and a retreat of the population with only primary education. There is, too, that these national efforts have developed at different rates, as can be seen with the less favourable results and pace "slower" of Portugal. Then also begin to shape up trends that are clearly oriented to the average European standard (secondary growth and higher education): the cases of Greece and Italy, with a preponderance of the population with secondary education (37.33% and 36.13% respectively) are those that most closely match the European average (44.7%), while Spain at the level of higher education completion results recorded were above the European average (20.4% of European average, and 25.4% in Spain), joining him to Greece with an increase of more than 10 percentage points this level of education (18.5%).

In 2013 remains the greatest weakness of Italy and Portugal in pursuing higher education rates but still, the recovery effort is notorious (16.2% and 19.3% respectively and the EU average of 28,4%). On the other hand, the best results in terms of secondary education are found in Italy and Greece (41.9% to 39.8%). Spain leads in higher education, with the highest percentage of population with this education level (33.7%). In turn, Portugal presents a great recovery between 2003 and 2013 at all educational levels (less levels below secondary and growth of secondary and higher education). However, Portugal remains as the country of Southern Europe that has the worst educational performance.

According to the goals of Agenda 2020, it is expected that the percentage of graduates with higher education among people aged between 30 and 34 years is 40% that year.

Portugal has a more fragile position concerning this indicator. It is, however, the country where the struggle for recovery has been proportionately more effective. The increased rates of graduates

(25 to 64) of 8.8% in 2000 to 19.3% in 2013, indicate it. It appears that, particularly from 2006 to 2007, Southern Europe has not shown an upward trajectory even when the crisis began. Generally, there are two main premises: (1) countries with worse outcomes in higher education data - Portugal and Italy – present obvious effort; (2) the common trend is above the average growth seen in the US, but it also shows a growth trajectory.

Incidentally, in terms of results, the evolution of the southern European countries is equivalent or even more positive than that observed in the countries of northern and central Europe. Any of the countries of Southern Europe shows similar rates of progress or superior to Sweden, Denmark, Germany and the UK, over the last 13 years. Portugal raised its graduate's rate by 10.5 pp.

Also, policies of Vocational Education and Lifelong Learning have had a central place in the European agenda as well as in other leading international organizations (OECD, for example). By extension, this is also true for national educational agendas. These policies have been consistently referred to as strategic tools for a quality of society, citizenship and social integration: To face the needs of labour markets in a competitive manner, in the context of the knowledge economy and information society.

Southern countries are converging with the European standard. The growth of schooling and tertiary qualifications are one indicator. This convergence presents however relevant differences between them and the results, either in periodization the rhythms of this convergence.

The increase of students entering Vocational Education pathways is evident in specific cases. Spain and Portugal increased by 24 percentage points and 18.2 percentage points, respectively the number of students who opt for this educational segment (Spain, Portugal and 45.5%, 43.8% in 2012). Italy, in turn, shows a decrease 4.4 percentage points, in line with the US average (a decrease of 4.3 percentage points). In 2000, Italy, however, presents a percentage above this medium (Italy: 63.6% and EU 27: 54.5% in 2000), having invested earlier this education segment. Greece has the opposite situation, where Vocational Education has increased slightly, below 50.2% of the EU average in 2012 (33.1%).

Despite these differences point to the existence of differing priorities of education policy at different time cycles, as well as different rhythms in the evolutionary trends within the Southern Europe, when included in the comparative analysis other member states of the EU, the evolution of the percentage of students who are part of the vocational areas within the total students in secondary education based on 1998 once again confirmed the general trend of the four southern countries have been at all similar to that seen in other countries in Europe.

In the case of Portugal, the New Opportunities program (Carneiro, 2011a, 2011b), appeared in 2006 in order to qualify and facilitate access of adults to education and increasing education levels. This program produced an extremely positive impact, with an increase of this rate by 6.4 pp (9.8% in 2013). From 2011 this indicator begins to sag result of national policy options, which led to the end of the New Opportunities program without that there was to be replaced by any other measure of equal size in the field of adult education and training.

Italy and Greece grew only slightly 1.4 pp and 1.9 pp respectively, with lower participation rates and a slower evolution. Greece has one of the lowest rates in Europe of 27 (2, 9%). It should be noted that both countries recorded declines in the first years after the crisis, returning to previous levels after 2011.

When we put in evidence the comparison with the other four European countries so far used to complement the analysis, we found that are northern countries that stand out for the highest participation rates (Sweden 28.1% and 31.5% Denmark in 2013) well above the EU average (10.5%), along with the UK at the rate of 20.5% (although it has fallen 4.4 percentage points in the considered time interval). Germany appears this panorama with values closer and even below those found in Southern Europe (registering 7.8% in 2013).

Nevertheless, southern European effort did not produce results distant from their northern peers. The rate of "early school leaving" calculated from data collected by the "Labour Force Survey" concerns the proportion of the population aged 18 to 24 who have not completed the secondary education and is not in a current education or training. It is a key instrument for the monitoring of education and training systems with regard to its quality and level of fostered success.

Italy (17.6%,) is closer to the EU average rate (12.8%) and Greece has the best position, with a rate of 11.4%, integrating the group formed by all the other countries represented here, of which only Denmark (9.1%) and Sweden (the only country that has worsened compared to 2000, from 7.3% to 7.5%) are below the European objective for 2020. The recovery in terms of the convergence of Portugal, Spain, Italy and Greece in respect of early school leavers is therefore unambiguous.

Once again we find a positive development allowing readings of quality of learning, the PISA tests, a test conducted by the OECD for youth skills with 15 years in mother tongue and mathematics. In both areas of competence is clear the positive developments in Southern Europe, which apart from some variations, stabilizes in results indicating improvement courses, but with more global inconsistency by Greece.

Skills in the use of mother tongue show that Southern Europe rises gradually after a period of oscillation, approaching the score of 498 the OECD average. On the contrary, other countries that were traditionally known for their best performance of education systems saw the PISA results decline. It is the case with Sweden (results now put this country under Portugal, Italy and Spain) related to the radical educational transformations in this country after the 1990s.

Concerning mathematics, results are generally more homogeneous in the four countries. Southern Europe follows OECD member's tendencies. In particular Portugal and Italy to demonstrate significant progress (Portugal rises 33 points, with a score of 487, and Italy goes up 28 points, with a score of 485) and approaching the average OECD score of 494. Southern Europe (apart from Greece) is in "counter cycle". They do not follow the general trend of decrease in these results, to which only Germany escapes.

In short, we can identify convergent paths of Southern Europe towards their European partners, translated by a clear pattern of approach of educational performance of the European Union average and OECD average. The convergence of results analyzed here comes mainly from national political efforts, partly driven by the European influence and the political effect of international comparisons. Against this background of diversity, but convergence proven, and the current context of crisis and the consequent impact of austerity policies in Southern Europe, it is relevant to understand the extent of the impacts over the Education sector.

Financial constraints the educational ideology: what changed education in Southern Europe during the Crisis?

The convergence process of Southern Europe is based on visible results of improved populations qualification levels and performance of education systems. This process was only interrupted in the case of Life Long Learning. Among all indicators, this one was the only indicator aggravated.

This happens despite the existence of budget cuts pronounced resulting from the austerity policy, this divestment trend materializes in accordance with the so-called "adjustment policies" structural, particularly the state deficit, which are contrary to public proclamations promotion of qualifications and investment in human capital. Are illustrative of this European double the statements of German Chancellor Angela Merkel told Bloomberg financial agency in November 2014, which states that Portugal and Spain have too many graduates and should therefore retreat in obtaining this degree as a priority, focusing rather on the level of vocational training secondary (Public Journal, 04/11/2014). As if the South were to accept an accrual low capacitating profile -

and consequently lower employment income - compared with its partners from northern Europe and from the centre.

The impact of austerity was felt in the evolution of expenditure on education as a percentage of GDP for a number of EU countries in the last 20 years. The evolution of expenditure had been stabilizing in the European Union since 1995, with Southern Europe registering a lower investment but approaching progressively the European average and already recording levels similar to countries such as Germany or the United Kingdom, while Denmark and Sweden have been always kept at a distance, including after slight further decline in 2009. With the advent of economic and financial crisis of 2007/8, we are witnessing an increasing global trend investment, which takes place until 2010. Meanwhile, the year 2011 is marked by the reversal of this trend, registering a reduction in spending in all countries included in the sample and the European average, which was higher fall in southern Europe.

This change has its origin in the European Council of 17 June 2010, which marks the turn to austerity on Europe's crisis response policies, establishing the need to "give priority to fiscal consolidation strategies favourable to growth and focused mainly on spending restraint" (European Council, 2010: 2), by strengthening the role of the Stability and Growth Pact in defining the goals, measures and national budgets. Note that this advice comes to frame external assistance for Portugal and Greece by the IMF, ECB and European Commission, and also the implementation of austerity measures packages in Spain and Italy, due to pressure from the European Commission that sense.

But as we can see, the impact on the results is not visible. The effects of changes in education policies only in term will be felt fully. For example, only in recent years we have seen Sweden suffer from the reform of the 90s. While the improvement of the Germany PISA results cannot turn off the effort to increase the frequency of school way of teaching that wished to balance the excessive by the dual system. It is therefore likely that the impact of budget cuts now checked is only fully reflected on the performance indicators of Southern Europe in a few years. This is a matter relevant to follow up. But you can also argue, more consistently with the data already available, that positive performance in Southern Europe is not proportional to the increase in expenditure, which stabilized or increased only slightly. Therefore, there are policy options, which appear to have the greatest potential impact.

But there is one country, Portugal, which is a particularly interesting case study. It is the country that showed more pronounced structural delays and where there has been a recent trend more pronounced, as a result of an intense dynamics at the policy level, but also one in which one of the performance indicators, the ALV, worsened significantly after the crisis.

What happened in Portugal in order that, in such a short time, unlike other countries where the crisis does not seem to have affected key performance indicators, this is accomplished? In fact, in the Portuguese case, there was a brutal shift of orientation in education policies. The context of the crisis worked more like a justification than as a cause of imposing an ideological agenda that reversed the course that had to be followed.

Indeed, a careful reading of the Memorandum of Understanding (MoU) signed between the Portuguese government and the troika ECB-IMF-EC in May 2011, hardly allows us to anticipate this trend. On the contrary, the single point specifically dedicated to education - 4.10 - underlines the need for the Government to continue with the efforts to fight low literacy and early school leaving and to improve the quality of secondary education and teaching professional qualification. These priorities take the objective of "increasing efficiency in the education sector, improving the quality of human capital and to facilitate adaptation to the labour market" (MoU 2011: 21).

It will not have been the Ministry of Education to trigger the start of a new tightening cycle and investment in education policies that he did not foresee. On the one hand, it opened a lock-up period, in which the concern with the management of austerity measures imposed to education overrides the concern about the performance of the education and training system. On the other hand, it takes place a crescendo of important tax measures of the conservative paradigm (logic of the debtor's "back to basics" American 60s) education by content, typical of a selective system - growing one that seems less be linked to specific financial constraints as the implementation of a conservative-oriented political agenda, which is representing the reversal of policies that were the basis of the convergence process.

The analysis of the Portuguese government expenditure on education captures the restriction laid down trend, and the impact of the austerity policy in state investment in this area. Public investment in education has been progressively increasing between 2000 and 2007, following the dynamics of system expansion. The advent of the financial and economic crisis of 2007/8 is matched, first, with increasing public investment in education, increasing from a value of 7.2321 billion euros in 2007 to 7348.6 in 2008 and 8507.4 in 2009. This option appears under the first phase of European guidelines to respond to the crisis with stimulus to the economy, for example in Portugal, through the modernization program of schools and the Technological Plan in Education.

With the introduction of the 2010 austerity package, which constitutes the second stage of this process, appears the decline in public investment, visible in the progressive reduction of the expenditure between 2010 and 2013, which changed from 8559.2 to 7108.4, foreseeing even a fall to 6.9591 billion euros in 2014. This same trend can be verified by analyzing the government

expenditure as a percentage of GDP. In 2009 the expense equals the maximum value of this century, if encrypting us 4.8%, falling progressively in the following years, registering a value of 4.2% in 2013.

In terms of content, reversing policies towards the introduction of a conservative educational agenda, translated into a set of measures that stand out:

- Adult education: Termination of the “Novas Oportunidades” programme and lack of alternative effective measures.
- Human resources: Significant reduction in numbers of teachers;
- Policies termination: Integrated training programmes such as the “Plan of Action for Mathematics”; Student support measures and scholar success promoting: Extracurricular areas such as “Accompanied study”; The “citizenship education”, course, which provided the time for schools developing different kinds of activities and projects; Ending of the Program of modernization of the buildings; Ending of the technological plan for education;
- Budgetary measures: Increasing the number of students per class; Reduction of the number of Teachers; Asymmetrical treatment on funding regarding with the reinforcement of the private sector education (“association contracts”);
- System design: Introduction of mandatory national exams at the end of the first and second cycles of basic education (9 year-olds & 11 year-olds); Introduction of “vocational courses”, partially inspired in the German dual system, addressed for children aged 12 years old in risk of school failure, creating from very early stages a system with two separate tracks. These measures, which aim at its base the social selectivity of students in ever earlier stages of their school paths are implemented in a framework in which the European authorities recommend improving education levels, "in particular seeking to reduce the dropout rate to below 10% and increasing to at least 40% the proportion of people aged between 20-34 years old having completed tertiary or equivalent education "(European Council, 2010: 12).

Evidence shows, therefore, that despite an official discourse promoting qualifications, the net result of the policies for education and training are the reduction of the investment and the reversal of policies that were in the know of the observed convergence. We are witnessing the subordination of education and training for macroeconomic solutions to the crisis and the political and economic future of Europe. We must therefore reflect on the link between the crisis, disruption of policies that promoted the convergence of southern European countries and the labeling process to which we have been witnessing since 2008. Even without translation

indicators such as AEP, the PISA or completion of higher education, but there are clear signs of the negative impact of political change. According to the National Board of Education school retention (the best predictor of future abandonment), while for the first time in the last four decades, the number of entrants in higher education was reduced in the academic year 2015/12016. We have seen, however, as the indicator of ALV not because the austerity program determines it, but only because the government saw no interest in adult education and training on a large scale.

The ECSE report

The aggregating label of Southern Countries in a specific political-institutional model has little resemblance to the reality of the respective companies, their education and training systems and their performance. Despite sharing a path of convergence with European benchmarks, the way down this path is quite different from each other. Further, the analysis of the indicators allows us to verify the grouping of these countries, as a single, indistinct reality has no analytical consistency.

The consolidated convergence in recent decades is now at risk due to the imposition of austerity measures, which brings us to the core of labelling people of these countries as lazy, as supposedly demonstrate the "resistance" to the qualification (labelling it is part of the PIGS tag). In fact, what is intended with this labelling is the application and solidification of a narrative of the crisis and, most importantly, on what should be the solution to the crisis. This narrative is intended to explain the crisis by the failure of Southern Europe, whose resistance to the qualification would make their economies less competitive and therefore their public finances, including protection policies, less sustainable.

But this narrative runs counter to the verification of educational convergence effort, forcing find other factors probably associated with the financial system, the profile of economic specialization and the prevailing discrimination in the agents of the markets, the explanation for the intensity who have been harmed by the crisis and the austerity policies

Still, at least for now, the negative impacts that have occurred in the Budget Plan are not visible in the performance indicators of education systems of these countries. In fact, where there is already evidence, everything seems to point to a greater influence of the ideological orientation of governments in the establishment of political priorities and their outcomes.

The report has 4 chapters. The first chapter presents the objectives and methodology of the project. It focuses the diachronic period from 2000-2013/ 2014. The analysis of these periods, before and after the crisis, focuses on adaptations and continuities of education policies.

The second chapter refers to the contextualization of Southern Europe and is divided in two parts. First, the characterization of these countries is produced at the light of a battery of socioeconomic indicators, further framed by social inequalities notions. Second, the characterisation of the education systems is done taking into consideration school offer and scholar pathways, as well as number of students and teachers. A further comparison is presented and discussed.

The following chapters focus on the comparison between two big themes, quality and equity. On the one hand, the third chapter is related to the Monitoring and Evaluating the quality of educational systems in Southern European countries. On the other hand, the forth chapter discusses equity and political achievements, agendas and outcomes.

Finally, the fifth chapter analyses, in conclusive terms, the weight of policies and political cycles over our exploratory variables.

Chapter 1 Objectives and Methodology

The educational systems' performance in Southern Europe showed, over the last decades, differentiated rhythms and paths, although sharing a significant improvement and convergence towards the European schooling trends. These achievements are illustrated through the evolution of some key indicators, such as the early school leaving decline, the improvement in achieving tertiary education, or the development of long life learning policies. However, when comparing Southern European countries with other member states, the first still present educational results below the European average. This means that there is still a necessity for some amount of effort at the political domain mainly, in order to accomplish the main goal of achieving international demands and bettering the domestic results.

Our preliminary analysis for the four Southern European Countries (Portugal, Spain, Italy and Greece) suggests two main points: First, a substantial effort to overhaul their Educational and Training systems and increase its performance. Consensually, increasing the population's qualification and bettering the educational performance serves both to social cohesion and economic development aims (Martins, 2012) – and this is a perspective fostered within the European initiatives such as the Lisbon Strategy, or the Europe 2020 strategy. Second, a considerable gap remains in achieving educational levels similar to the Central and Northern European counterparts. (Education at Glance 2012, 2013, 2014)

During the 1970s, Europe developed important political instruments towards a communitarian consolidation. During this period, Education emerges as a concerning and a central political point, particularly in case those countries with the weakest economies and the lowest educational performances. With the Maastricht Treaty in 1992, and particularly its article 126¹, Education became a priority for future intervention, entering

¹ ARTICLE 126

“1) The Community shall contribute to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and supplementing their action, while fully respecting the responsibility of the Member States for the content of teaching and the organization of education systems and their cultural and linguistic diversity

2) Community action shall be aimed at:

-developing the European dimension in education, particularly through the teaching and dissemination of the languages of the Member States

- encouraging mobility of students and teachers, inter alia, by encouraging the academic recognition of diplomas and periods of study

the European politics dominion through a mutual agenda planning member states' orientations towards the so-called "Europe of Knowledge".

This political conception reflected the economic influence on education and training, with countries' performance (meaning schooling rates) beginning to be presented as an economic growth indicator. Lisbon Strategy remains as one of the most important processes on showing the benefit of economic development and modernization of Europe, approaching Education and Training as one of its major targets, well centred on political communitarian domain. Nowadays, countries with the most developed economic structures, better labour markets structures and a positive economic productivity index are also those with the best performances on education.

"The most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion"

Lisbon Strategy, 2010.

The Lisbon Strategy represented an action plan devised in 2000, which set a framework until 2010. At this point, the concerning was: to increase Europe's competitiveness by investing in a knowledge-based and productive society; respond to the challenges of the Information Societies and Globalization (meaning: demographic changes, social inequalities, educational quality and effectiveness); improve compatibility between educational systems structures; Lifelong Learning developed in all member states; creating a common reference for recognition of qualifications and competences. The targets were "employment rates", "gender equality on employment", "economic growth", as well as on education and training reforms and investments.

As it is well known, recently Greece and Portugal were both involved in rescue plans with the intervention of TROIKA at 2010/2011; Spain signed a stabilization pact in 2010; and Italy experienced several internal budget restrictions. We may question the effects from the austerity measures implemented in these countries ever since; from the budgetary

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- promoting cooperation between educational establishments
 - developing exchanges of information and experience on issues common to the education systems of Member States
 - encouraging the development of youth exchanges and the exchange of socio-educational instructors
 - encouraging the development of distance education" (Article 126 of the Treaty on European Union).

restrictions, currently intensified with the political crisis being experienced in Greece. Once these countries had primary economic and social fragilities the feasibility of these international intervention in small and peripheral countries became a matter of concern. In fact, on one hand, we have to considerer that some changes were the result of a direct response, or a process of adaptation which took in account the negative economical outcomes from the crisis and international impositions, and one the other hand, we also have to considered the internal political dynamics and the internal political priorities in each southern country.

Summing up, the Southern European Countries were engaged in a process and trajectory of convergence regarding education and training performance's and results, process interrupted since the burst of the crisis. Austerity has been, after 2010, one main political response to the crisis, curtailing the public investment and thus the state funding towards education. On the other hand, mass unemployment, drastic slowdown in economic activity and the significant decrease in workers income have also potentially changed both the will and ability of families and investors to invest in Education and Training (Guerreiro, 2011).

Considering the current scenario of economic and budget crisis, one should question to which extent are, in fact, the signs of public disinvestment on education observed in these countries, of if we are facing financial restrains with mainly severe aspects of adaptation on funding and public budget. Further, one should ask in which extent these adaption measures can actually explain the changes observed in policies and educational outcomes.

The present report is the result from the international project research, "Educational Challenges in Southern Europe. Equity and efficiency in a time of crisis"- ECSE Project, coordinated by a Portuguese Team from CIES-ISCTE- IUL and with partners/consultants from Spain, Italy and Greece. Mainly, the ECSE project focus on the crisis's impacts in southern European countries on the educational matrix, stretching out the impact of the common recession on the outcomes of these countries' education and training systems. The project was developed between 2013 and 2015, focusing on period between 2000 and 2014 in order to sustain a diachronic analyses, distinguishing the period preceding the crisis – mostly, by reporting the educational achievements fostered since Lisbon Strategy - and the recent period within a crisis context – represented by the several budget

cuts and national policies restructuring. The main aim is, thus, to identify the major changes and adaptations that Southern European countries faced during the overall period.

The negative outcomes of the aforementioned budget crisis on education, particularly those looking into the funding and the levels of expenditure (OECD, 2013; OECD, 2012) or in the educational efficiency, have been a matter of discussion. The ECSE project focus was the political framework and the existing response towards the crisis. Departing from the interpretation of specific data and using a diachronic perspective, we analysed in which way southern European countries were affected, as well as the main differences and regularities identified among those countries. This way, the relevance of the project concerns also in its approach on Southern Europe as region with specific characteristics in the European educational framework.

A project that highlights the crisis impacts on education is easily justified by the current geopolitical context but also by the importance of education within the European framework, particularly since the Lisbon Agenda, in particular the re-emergence of human capital theories linked with economic development and educational performance and attainment (Schultz, 1961); the development of an “European Educational Space” (Dale, R. 2002, 2004, 2005; Martins, 2012), the emergence of Lifelong Learning agendas, the intensification of the discussion over the globalization impacts, and the Europeanization process (Featherstone, Kazamias, 2000) on education and national policies (Meyer, J., Ramirez, F, Soysal, y. 1992 ; Dale, 2002, 2004 ; Green, 2006, 2013 ; Martins, 2012; Azevedo, 2007; Antunes, Fátima, 2004, 2005); and secondly, considering the specific characteristics of southern societies and its educational outcomes, with structural problems still characterizing these societies (such as the population’s qualification; early school leaving highest rates, or the highest school failure rates.)

The ECSE project innovates in two main fields. Firstly, the education and training structures, processes and outcomes are put in relation to the impact of macroeconomic trends, a theme that has not been sufficiently addressed and that is of great actuality; in the second place, it innovates in the methodological approach, in two ways: the comparative analyses between the four countries is based not only on international data, but also in deep national based research – sustained by the work developed all over the

years by the team members, particularly by the coordinator team - the conceptual and methodological framework for the comparisons will be built mainly upon the contribution of researchers from the southern countries. As it was said, the range of the ECSE project is the four of southern Europe countries: Portugal, Spain, Italy and Greece. Treating these Southern European countries as a group for analytical proposes is justified on several accounts. Firstly, these countries share a similar economic, social and political background, including relatively recent authoritarian experiences, recent welfare states (Ferrera, 2000) as well as economies hampered by productivity and competitiveness problems (Capucha, 2014; Niemeyer, 2007;). Secondly, the economic crisis has been especially severe in these countries. What are the consequences of this crisis in both the achievement of educational goals and the design of educations and training systems, and what are the consequences for the fight against the crisis, are the two main questions envisaged by the project.

The project methodology and data's analyses, follows the importance of a fluid vision concerning the general policies and the diachronic analysis, combined with specific indicators that have shown more accurate results. The first one, allows us to understand the main political changes and its impacts on policy-making in a more generic way, and the second to isolate some results stressing differences between the southern countries in some educational dimensions. Table 1 resumes the variables, dimensions and indicators.

Table 1. Variables, dimensions and indicators.

SOUTHERN EUROPEAN COUNTRIES Portugal, Spain, Italy, Greece			
	Equity		Quality assessment and monitoring
PARTICIPATION ACCESS	<ul style="list-style-type: none"> • Tracking/selectivity • Schooling dynamics/ enrolements • Scholar pathways and transitions process • Diversification of the school population 	STUDENTS	<ul style="list-style-type: none"> • Standartized exams • External assessments
SUCCESS/ RESULTS	<ul style="list-style-type: none"> • Attainments • Educational programmes • Early School Leaving; PISA; Adults education; Special education 	TEACHERS	<ul style="list-style-type: none"> • Evaluation • Monitoring • Profissionalization
EXPENDITOR	<ul style="list-style-type: none"> • Public/private financing • Students expendor • Aiding 	SCHOOLS / ORGANISATIONS	<ul style="list-style-type: none"> • Public management
Explanatory Variables: Severity of the economic /financial crisis (2008- ...) & Political cycles			
Research hypothesis: The education system as a process, in its ambivalence: Democratization Vs Selectivity			

The research hypothesis figures two main dimensions: democratization vs selectivity. Both dimensions are contributing to the comprehension of educational equity in southern European countries and their educational systems. We assume, and it is our main argumentation, that crisis and political governance (in the form of the several governments in last years, in all four countries) both had great influence on educational systems and its results. Which of these two explanatory variables were the most relevant on policy-making changes and educational results, between 2000 and 2013? It has been a central goal to understand how educational systems in Southern Europe, within a context of crisis, have been able to promote, through its political mechanisms, durable processes of equity in education. Adding, had the impacts of the current context of crises,

leded to greater selectivity in education? Considering the data analysis method, as well as the indicators used, we achieved, on one hand, to results within a diachronic perspective allowing to compare the four countries, and on the other hand, to consider the autonomous impacts of the policies that have been implemented.

Indicators and Dimensions

Our main dimension – earlier defined - were analysed and materialised through a set of indicators. These indicators were mainly chosen considering several studies developed in Education and its relation with equity and quality, particular from OECD: “Equity and quality in education” (OECD, 2012); “What’s equity in education?” in Education at Glance 2012: Highlights, (OECD, 2012); Key Data in Europe (Eurydice, 2012, 2013); “Funding of Education in Europe – the impact of the economic crisis 2000-2012.” (Eurydice, 2012).

The indicators, both quantitative and qualitative, were analysed to capture the signs of adaptation, or rupture within the educational policies and in relation to the context of crisis. Considering the diachronic analyses mentioned before, the year of 2000 was chosen as the “ year zero” mostly because of the impact of the Lisbon Agenda (2001), which allowed to benchmark the position of the four countries and capture a specific moment concerning European educational policy. Among the areas analysed we can generally identify: (1) access to the education system and educational system and its diversification; (2) success and school results; (3) access of specific segments of the population: with special educational needs and adult population;(4) a set of organizational and institutional aspects, concerning educational systems, their designs and the processes of evaluation and quality; which, finally, allowed the discussion of the levels of equity and quality in Educational systems of southern Europe.

In a more specific way, and according to our initial plan presented in the project proposal/application (PTDC/IVC-SOC/5079/2012), the indicators were distributed within the follow main areas, or aspects:

(1) all education and training pathways available to students up until the start of their active life (be it at primary, secondary or tertiary level) as well as existing devices and strategies to prevent early school leaving;

(2) the adult education and lifelong learning, dealing with education and training paths, targeting population aged over 25 as well as the range of devices for recognition and validating of qualifications;

(3) The transparency of qualifications and the articulation between the education and training systems. Mainly seen in tracking, educational pathways and access to tertiary system.

(4) the structure of services and benefits aiming at guaranteeing universal access to the education and training systems, as well as, the specific national programmes towards the educational success and equity promotion– such as scholarships, transportation, feeding, housing, studying materials, special education for disabled persons and also social support to underprivileged pupils.

Within these areas, the following key dimensions of analysis were considered: (a) in diversity and relative importance of available pathways within the system (including institutional design which concerns system governance, learning mechanisms and institutions); (b) in curricula, transitions and levels of success - which is linked with the organization, flexibility and transparency of the structure of courses and educational options; (c) in human resources, comprising large numbers (teachers, pupils, staff), teachers' training and working conditions of the learning agents, which are linked with the issues of Quality; (d) funding circuits, which concerns the origin (public, or private) and magnitude of the financial resources channelled into the educational sectors.

The goal here was to capture how Southern European states have steered the policies regarding the investment in equity and social inclusion, as well as the responses that were set in place to deal with the effects of the crisis.

Considering the national report structure the dimensions were simplified in a more flexible matrix considering the indicators and themes/subjects treated. (Please see in Appendix – section 1 – The contents of the reports)

Research Plan and stages of the investigation

The research plan comprised four stages: (I) Model of Analysis - the development of the theoretical, analytical and methodological models of the research project. In this stage, a set of indicators were signaled concerning the main dimensions above described. A common analytical grid was assembled, comprising the main areas to be analysed in the national studies as well as the national reports structure, discussed and worked with all partners at the end of the second meeting/workshop. The collecting of the main information/data from international data bases, which has served the national reports production, were made namely from UNESCO/OCDE/Eurostat, Eurydice, ESSPROS (Integrated System of Social Protection Statistics) and CEDEFOP (European Centre for the Development of Vocational Training) the main sources for information in order to guarantee data comparability between the four countries. ; (II) Parameterization of data collecting – preparing the national data packages by the Portuguese team, that functioned as the main support for the development of the each national studies. These data were complemented with other information collected by each team, especially concerning national educational policies. Each section of the national report had a specific excel document containing data, graphics, figures and metadata (III) National Studies - the production of the four national studies, the basis of the ultimate comparative report. Each team had made one national report, following the main dimensions. (Please see in “Appendix” – section 4 the four national reports) (VI) Comparative analyses - The analysis of results obtained in the national studies and production of a comparative study, in a form of these ultimate international and comparative report; and (V) dissemination and public discussion of the results – several public presentations were made, 8 conferences and communications; two articles were published and, until now, two other articles are being closed for international submission. Adding, each team is preparing one article concerning its own national report (national publication) and 3 other articles (for international publication) after the final report’s submission.

Analytical focus

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

- 1) Indicators of Performance (2000 – 2013) – collecting and analysing major indicators on access, success and quality within the Educational System, as well their dynamics and key agents involved;
- 2) Change and Innovation in Policy making (2000 - 2013) – establishing a timeline in what has been produced on the education policy field (2000 - Lisbon Strategy), which includes international demands or agendas; establishing or detecting differences on policies or even trends in educational policy; and at last but not least, developing the diachronic perspective as a comparative method for analyses ; Analysing the specific policies that could explain the results and the main figures previous analysed.
- 3) Effects of the crisis on the system’s ability and capacity for promoting educational equity.

Working on an open analytical framework assured that national specificities were considered in all the analytical dimensions and, simultaneously, that the comparative goal was also achieved, allowing to describe the effects of the crisis on education and predict tendencies of evolution.

Two main concepts underlined the project objectives and premises. Each team was free to present their own perspectives, based on their own contexts and national lines of investigation of equity and quality in education, however, and in order to keep the comparative goal, *Equity* was generically referred to *effective*, as opposed to *formal equal educational opportunities*, implying the focus 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 – labour market structure, levels of employability, social participation and cohesion, levels of criminality) (Lemos, V. 2014). *Educational quality* was examined from the perspective of the performance of the education system, mainly the processes – meaning national and international evaluations, specific instruments - that guaranty the equity.

Methodology

“Today, the dominant theme in comparative education studies is globalisation. The comparative study of education systems is viewed not only in relation to what we can learn from other societies to improve educational policy and practice within one country, but also with regard to how the field might contribute to a safer and more equitable world.” (Arnove, 2010)

The research was drawn upon a comparative methodology (Ragin, 1987; Scriewer, J., 1988), supported by data collecting from sources such as: Eurydice, Eurostat, OECD, ESSROS (The integrated system of social protection statistics), CEDEFOP. The data comprises three types of information: statistical indicators collected from the mention international databases; analyses of official documents (legislation; national agencies reports; public programs); semi-structured interviews with privileged observers (mainly academic and key actors on public policies and education) – each team conducted one interview, in order to discuss the impacts of the crisis in policy-making; equity within the educational systems; and the importance of the mechanisms of quality and evaluation of the educational systems.

The analysis resulted from the comparison between the international information and national data signalized and treated in the national studies. In addition, researchers from each country were encouraged to use other data considered to be relevant for their national context descriptions. It is expected, therefore, not only to know in depth the educational systems in Southern Europe, but also to observe how each one of them were affected by the crisis and what type of answers have been described to deal with it.

Data assembling was coordinated by the Portuguese team and driven by the main analytical model which was materialized through the strategic indicators identified in the previous section. The project's analytical focus and main questions concerning the indicators to be analysed, had an open approach but simultaneously a well delimited and comparative framework established on the report's structure. (Please see in “Appendix” – section 1- The contents of the reports)

One characteristic of the comparative methodology was the actual partnership among all members of each national team, which introduced a more qualitative and comprehensive line of analysis, rather than adopting a focus mainly on information provided by international reports or networks (which do not include specific national evidences). From this partnership resulted a common database set of educational outcomes and results, particularly focusing on: the school attainments and the participation of the southern European population in education, which helped in determining the levels of schooling dynamics ; the funding and the expenditures levels in education by the national governments; the participation and access of specific groups and adults education development; the indicators on success and school failure; the indicators on resources and infrastructures; the international results on PISA and other important international tests.

Having in mind the comparative goal of the current project, two workshops were conducted (November 2013 and September 2014), wherein the structure of each national report was discussed of, underlying the analytical grid and launching the production of each national study. Identifying the main difficulties and problems during the aimed comparison were a priority, which resulted in the restructuring of each national report in some dimensions, particularly those concerning the *Quality* issues. Therefore, *Quality* revealed to be a more problematic issue due to its representation in each country - therefore, two sections within National's report structure were organized: “Processes and Mechanisms of Monitoring and Evaluating the Educational System”, comprising all evaluating mechanisms and questions related with teacher's training and international evaluations; “Final notes on Equity and Quality: Orientation and Processes”, which had offered an integrated and conclusive vision of the main areas of the project.

Considering the data assembling methodology: the first step was to access the major statistical indicators using international reports or databases, under the Portuguese team's

responsibility; the second step meant to focus on each national report production referring to the specific national contexts. This meant that whenever each team found difficulties in collecting extra data, or specific difficulties in interpreting the major data, new options were discussed to maintain the target goals. For instance, the Greek partner had difficulties in assembly data concerning Greece's educational funding and expenditure. Once it was a main area of analyses, the effort was given in maximum of information within a more qualitative approach. A third step referred to the need for accounting other dimensions, in order to follow the analytical grid, mainly those related to policy analysis and the key agents in policy-making. As it was said before, each team conducted one interview with a national political expert, following a common and opened interview guide. Given this qualitative approach, a much more dynamic vision to access specific information from national contexts.

The comparative analysis once each national studies was completed, and followed a new analytical grid directly related with the dimensions within national report.(Please see in "Appendix" section 7 – Final Analytical Grid and indicators).To put in a nutshell, or to summarize, we identify three main phases of the project:

1st Phase

Step 1 - The Analytical Grid proposal and collecting data.

Step 2 - Template and reports structure.

2nd Phase

Step 3- the National Reports – national studies, using the international data collected by the Portuguese team, combined with national relevant indicators.

3rd Phase

Step 4 - Comparative analysis and the main results.

Chapter 2. A comparative approach: Southern Europe characterization. Context and Educational Systems.

This chapter is organized in two parts from which we intend to describe and characterized Southern European Societies considering levels of inequality, structural characteristics (qualification, employment, levels of expenditure) as well as crisis effects in one first part; and after, in the second part, charactering the education systems.

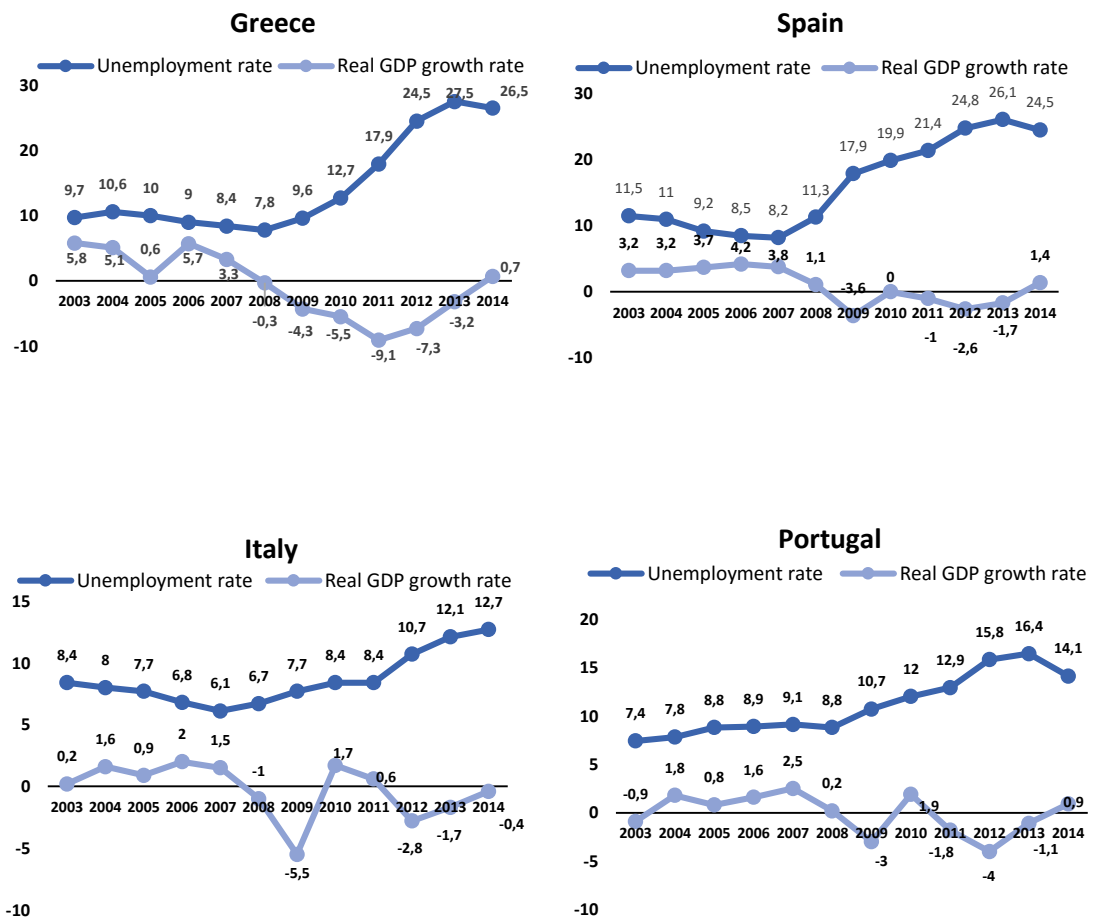
Within a path to more globalized societies, the progress and development happened differently, affecting social structures and living conditions (OCDE, 2008). The increase of income inequality in most western countries, since the mid-twentieth century follows as an example. Among the different factors that have contributed to such phenomenon (such as structural changes, low effectiveness of fiscal policy or international dynamic as globalization), the financial and economic crisis created even greater divisions between the rich and poor - more evident in countries where economic adjustment programs were applied, as it happened in Greece, Spain and Portugal, but also in Italy.

Through a comparative statistical analysis, this chapter has the objective to compare the extent of how the economic and social vulnerability, especially in these countries, comparing with the rest of the European countries, are related to the inequalities in the education system. Has the economic and financial crisis of 2008, contributed to worsen the already existing social inequalities that affect the occupational and educational system in these countries?

In addition to the profoundly “unjust” and unequal framework that marks southern European countries, recent studies have shown how inequalities affect the economy, namely, the effects on economic growth (Piketty, 2014; OECD, 2015; IMF, 2014). Figure 2.1.1 presents the evolution of the real growth rate of GDP and unemployment between 2003 and 2014 in Portugal, Spain, Greece and Italy. We conclude that the pace of economic growth was obviously related to the evolution of unemployment. The fall in the economy in southern European countries, that is, roughly, from 2009 on, is accompanied by an increase in unemployment, which has worsened in recent years. We can then

conclude that there has been a considerable deterioration in living conditions in these countries.

Figure 2.1.1 Evolution of real growth rates of GDP and unemployment in Greece, Spain, Italy and Portugal (%), between 2003 and 2014



Source: Eurostat

2.1. Crisis on Europe's southern countries

Portugal

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 (XVIIth Constitutional Government 2005-2009 and XVIIIth 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).

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 (Portugal report).

Spain

In Spain, several years before joining the Euro zone, the country 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. 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.

Italy

Italy is recognized 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.

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.

Greece

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).

2.2 *Qualification and employment*

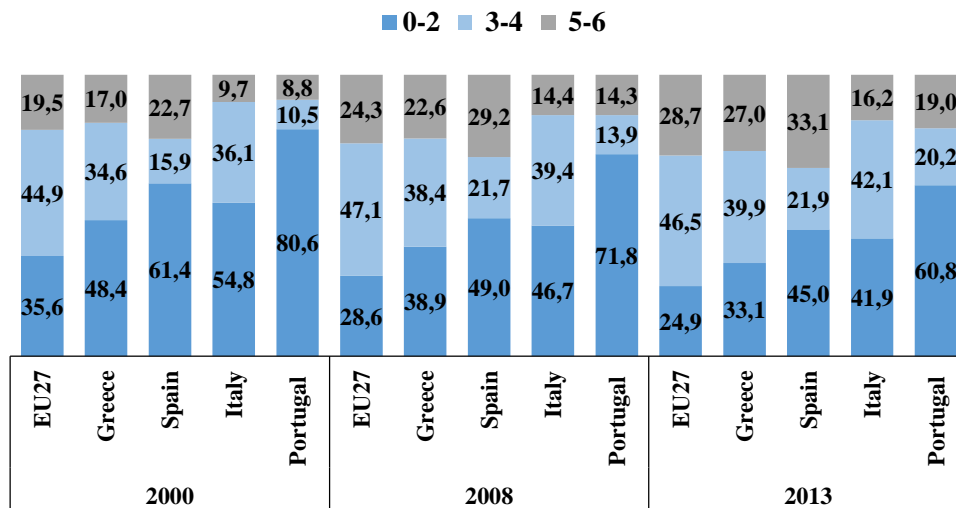
Social inequality levels are related with the education context. In a long term, education has its impacts in social and economic context of a country, for instance considering poverty and the possibility of overcoming the familiar background, but, on the other hand, we can assume that poverty has almost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

Figure 2.1.2 presents the percentage of educational attainment in pre-primary education and lower secondary (ISCED 0-2), upper and post-secondary education (ISCED 3-4) and tertiary education (ISCED 5-6), for 2000, 2008 and 2013, in Greece, Spain, Italy, Portugal and European Union 27. When analyzing this indicator over the three years, we can conclude that the general trend is related with the decrease of educational attainment within lowest levels of education (0-2), and an increase of the remaining levels of education (3-4 and 5-6 levels).

Between 2000 and 2013, the percentage of individuals from Southern European countries having as a maximum level of education completed ISCED 0 and 2, has always exceed the UE-27 average. On one hand, when comparing the four countries, we see that Portugal stands out has having the highest rates in this educational levels (80,6%, 71,8%, 60,8%, respectively) which is revealing of a worst position and still a negative trend in this country. But on the other hand, progresses were as well observed, as Portugal was the country presenting greater improvement in the other levels of education: the educational attainment for the levels 3-4 increased 9,7 percentage points (from 10,5 to 20,2%) and levels 5-6 increased 10,2 p.p. (from 8,8 to 19%), between 2000 and 2013.

Considering the attainment in tertiary education (5-6), in 2000, only Spain (22,7%) surpassed the EU-27 (19,5%). Among all four countries, Spain had the major increased along with the period in analysis, in tertiary educational attainment (more 10,4 percentage points) and in 2013 presented the highest percentage of this level (33,1%).

Figure 2.1.2 Evolution of educational attainment (%), by ISCED, 25-64 years, between 2000, 2008 and 2013, in Greece, Spain, Italy, Portugal and EU-27.



Source: Eurostat

Note: The International Standard Classification of Education (ISCED) is a classification adopted by UNESCO and other international organizations (including EUROSTAT) for the international collection of education statistics. Levels of education: ISCED 0 (pre-primary education); ISCED 1 (primary education); ISCED 2 (lower secondary education); ISCED 3 (upper secondary education); ISCED 4 (post-secondary non-tertiary education); ISCED 5 (tertiary education); ISCED 6 (advanced research qualifications).

When looking at the evolution of educational attainment according to the age groups, it's observed that, in all countries, primary or basic is more significant in oldest age groups with 55-64 and 45-64, while youngsters (25-34) are the more representatives in higher education attainment (ISCED 5-6) (see annexes, Figure 2.1.2a). In Portugal, nevertheless, younger groups still present considerable proportion (42,1%) of individuals with only the primary or basic level. This is a structural problem linked with the historical expansion and dynamics of their schooling process. Even though this is a diminishing tendency, Portugal is still facing the early school leaving problem, which stands as one of the highest

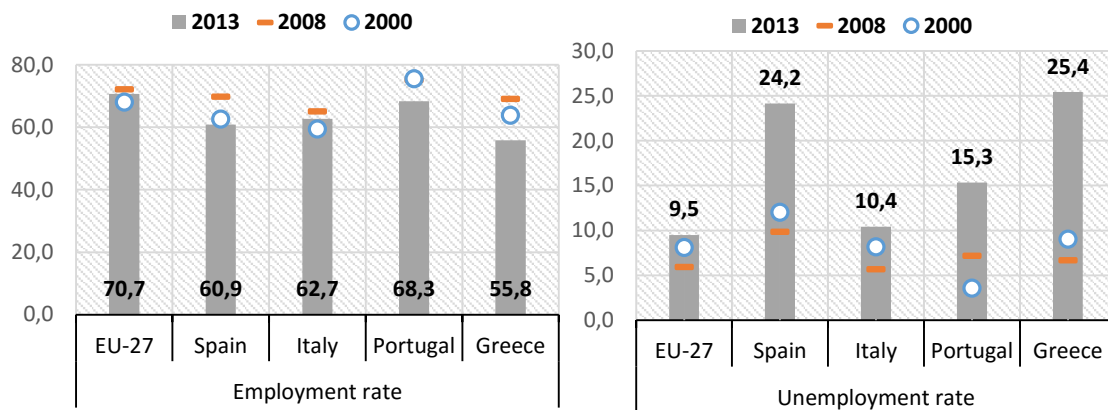
of the EU, as well as with a labor market structure that absorbs low qualified youngsters. However, we may assume that this relation, between labor market and low qualified people, may be different in this recent context of crisis where major unemployment rates are mostly affecting the youngest.

In Figure 2.1.3 shows the annual averages of the employment and unemployment rate, in EU-27, Greece, Spain, Italy and Portugal (2000-2013), for population between 25 and 64 years old. Regarding the employment rate for 2000, the rates in Portugal (75,5%) were significantly above in comparison with the other Southern European countries and also in relating with the EU-27 (68%). Between 2000 and 2008, the employment rate for Italy (from 59,4% to 65,1%), Greece (from 63,9 to 69,1%) and Spain (from 62,6 to 69,8%) increased, respectively, 5,6 percentage points, 5,2 p.p. and 7,2 p.p., thus approaching to Portugal's rate (75,1%) and the EU-27 (72,1%).

Since 2008, the year that marks the beginning of the financial and economic crisis in the United States, all southern countries felt a decreased in employment rate: minus 8,9 p.p. in Spain (from 69,8% to 60,9%, in 2013), minus 2,3 in Italy (from 65,1% to 62,7%), minus 6,8 p.p. in Portugal (from 75,1% to 68,3%) and the most significant drop was felt in Greece, between 2008 and 2013, the employment rate declined 13,3 percentage points (from 69,1% to 55,8%). All countries stood in 2013, bellow the EU-27 average (70,7%).

The decrease in the employment rate was accompanied by rising unemployment. Between 2000 and 2008 the value of this indicator in these Southern countries and for the EU-27 average fell, with the exception of Portugal, where unemployment rose 3,9 percentage points. However, between 2008 and 2013 the unemployment rate had a sharp rise in all countries here considered: Greece increased an astonishing 18,8 percentage points, Spain rose 14,3p.p., Portugal rose 8,2 p.p. and Italy rose 5,7 p.p.

Figure 2.1.3 Evolution of the employment and unemployment rate (%), pop. age 25-64 years, between 2000 and 2013, in Greece, Spain, Italy, Portugal and European Union 27



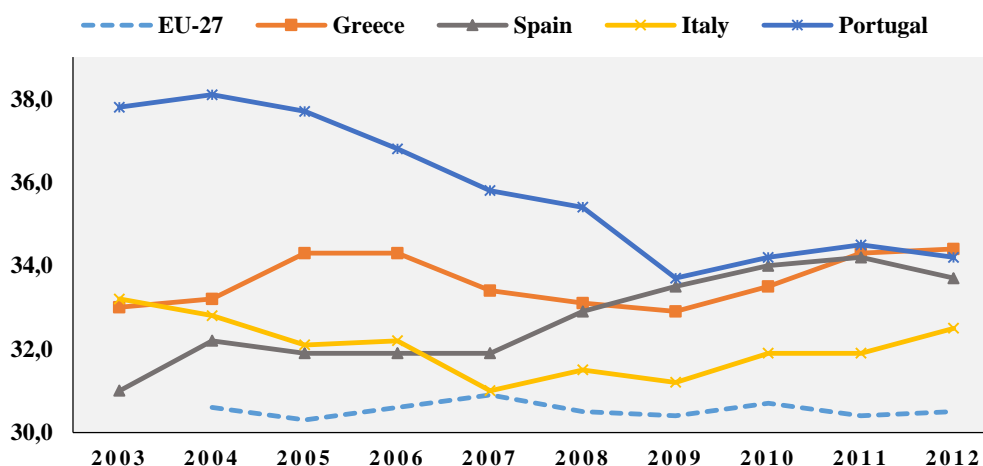
Source: Eurostat

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. For instance, 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. Unemployment rates in these countries increased considerably - especially youth unemployment - leading to an increase in social inequality. In Portugal, 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.

Levels of social and education inequality

The main indicators used to analyze income inequalities are the Gini coefficient, a summary measure, that ranges from 0 (complete equality) and 100 (complete inequality), and S80/S20, a “percentile ratio” calculated as the ratio of total income received by the 20% of the population with the highest income to that received by 20% with a lowest income level. In Figure 2.1.4, we observe the trends in the evolution of the Gini coefficient in the southern European countries between 2003 and 2012. Broadly, in the last three years the Gini coefficient increased in all four countries. In 2012, Greece was the country with highest value of this indicator (34,4%) – between 2008 and 2012, it rose 1,3 percentage points. In 2012 Portugal was the second country with the biggest income inequality (34,2%) – after a period of recovery seen in this indicator at the beginning of the century, inequalities started to increase again after 2010. Also in Spain the Gini increased since 2008 (more 0,8 percentage points, from 32,9% to 33,7%). In Italy’s case, the coefficient reached in 2012 (32,5%) the highest number ever since 2004 (32,8%).

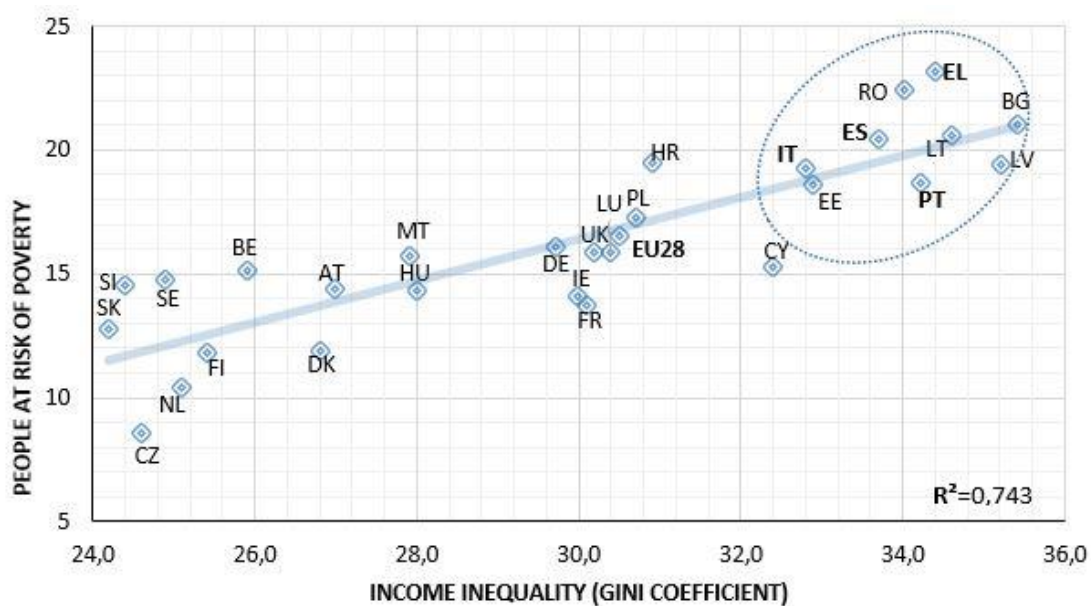
Figure 2.1.4 Trends in the Gini coefficient in the south European countries (2003-2012).



Source: Eurostat

In parallel with the increased of inequalities, it was also observed in these countries the increase in poverty levels. As it is shown in figure 2.1.5, income inequality explains 74% of the variance in the risk of poverty in the European Union, meaning that countries with high levels of inequality are usually the ones having more individuals within poverty conditions. In 2012, among the countries with highest levels of income inequality and poverty, we find Greece, Spain, Portugal and Italy, which deviate largely from the EU average.

Figure 2.1.5 People at risk of poverty (60% of median equivalised income after social transfers) and income inequality (Gini coefficient), EU-28, 2012



Source: Eurostat, EU-SILC, 2015

Legend: BE (Belgium); BG (Bulgaria); CZ (Czech Republic); DK (Denmark); DE (Germany); EE (Estonia); IE (Ireland); EL (Greece); ES (Spain); FR (France); HR (Croatia); IT (Italy); CY (Cyprus); LV (Latvia); LT (Lithuania); LU (Luxembourg); HU (Hungary); MT (Malta); NL (Netherlands); AT (Austria); PL (Poland); PT (Portugal); RO (Romania); SI (Slovenia); SK (Slovakia); FI (Finland); SE (Sweden); UK (United Kingdom).

In order to see how the risk of poverty changed in the southern country in regards to the elderly and youth, Table 1.2a presents the evolution of poverty risk rate between 2004 and 2014 for these age categories (Table 2.1.1).

The results reveals that in all countries, the poverty risk rate in individuals over 60 years old have been decreasing (with the exception of Greece in 2011), and the reverse happens in the age between 0-17 years. In 2013, Greece had the largest percentage of youth in risk of poverty from the four countries (28,8%), followed by Spain (27,5%), Italy (25,2%) and Portugal (24,4%). In Greece, between 2011 and 2012 this indicator rose 3,2 percentage points (from 23,7% to 26,9%). In Spain, the most significant increased happen in 2009, where the indicator rose 1,7 p.p, and 2 p.p. between 2008 and 2010. Since then, the indicator started decreasing slightly. In Italy, 2012 marks the year with the highest percentage of youth in poverty (26,2% - more 2 p.p. then 2008). In Portugal, between 2012 and 2013, risk of poverty for youth increased from 21,8% to 24,4% (almost 3 percentage points, the highest value from time series).

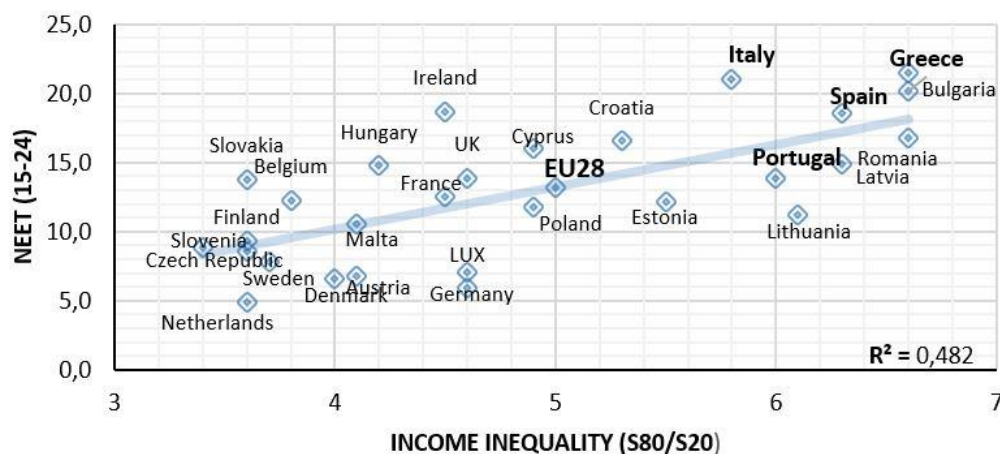
Table 3.1 risk of poverty rate, according to age group, in the southern countries of Europe, 2004-2013

		2005	2006	2007	2008	2009	2010	2011	2012	2013
Greece	0-17	20,4	22,6	23,3	23,0	23,7	23,0	23,7	26,9	28,8
	≥60	26,1	24,9	22,0	22,1	21,1	20,8	23,0	17,7	15,8
Spain	0-17	26,0	27,1	26,2	27,3	29,0	29,3	27,5	27,9	27,5
	≥60	27,0	27,4	24,6	23,2	22,1	19,8	18,7	15,2	13,7
Italy	0-17	24,7	24,4	24,6	24,2	24,1	25,2	25,9	26,2	25,2
	≥60	:	:	:	:	:	27,5	27,2	24,2	22,0
Portugal	0-17	23,7	20,8	20,9	22,8	22,9	22,4	22,4	21,8	24,4
	≥60	25,6	24,9	24,7	21,7	19,9	20,0	19,2	17,6	15,5

Source: Eurostat

In figure 2.1.6 shows how using a simple linear regression allows us to understand that the percentage of youth neither in employment nor in education and training (NEET) is positively correlated with the income inequality of the European countries ($R^2=0,482$). After Bulgaria, which is the country with highest level of NEET (21,5%), we can find Italy (21%). Also having a large percentage of youth neither in employment nor in education and training, is Greece (20,2%), Spain (18,6%) and Portugal (13,9%).

Figure 2.1.6 Youth neither in employment nor in education and training (NEET) rate, age group 15-24 and income inequality (S80/S20), in EU-28, in 2012



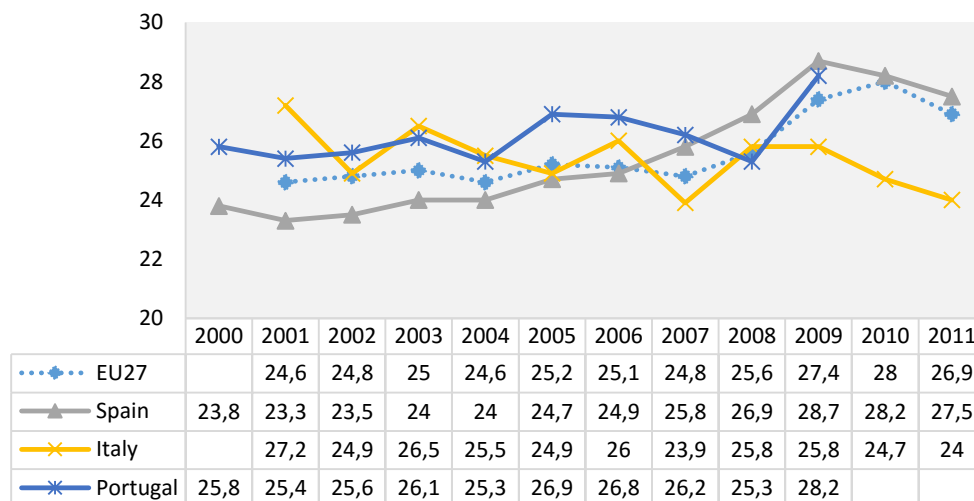
Source: Eurostat

Summarizing, we observed that in recent years as a result of the crisis, and hence the exponential low economic growth and the increase of unemployment, inequality and poverty levels increased significantly in these countries. The most affected were the youngest population, especially those with lower educational levels, which are most vulnerable to the negative consequences of the crisis (see annexes, figure 2.1.6a).

Educational expenditure

In Figure 2.1.7 it's presented the expenditure on public and private educational institutions, between 2000 and 2011, in Spain, Italy, Portugal and EU-27. Between 2000 and 2005, only Spain had an annual expenditure below the EU-27. Between 2000 and 2009, Spain consistently increased the levels of expenditure in public and private educational institutions by 4,9 percentage points (from 23,8% to 28,7%), becoming within all the four countries the one with the main levels of expenditure. Yet, the last years show a decreased of the expenditure – and the indicator dropped 1,2 p.p. Also in Italy we can observe a reduction of expenditure on both public and private educational institutions, from 2009 on (less 1,8 percentage points, from 25,8% to 24%). This trend in the two countries, follows the European average, which has dropped 1,1 p.p. between 2010 and 2011.

Figure 2.1.7 Annual expenditure on public and private educational institutions compared to GDP per capita



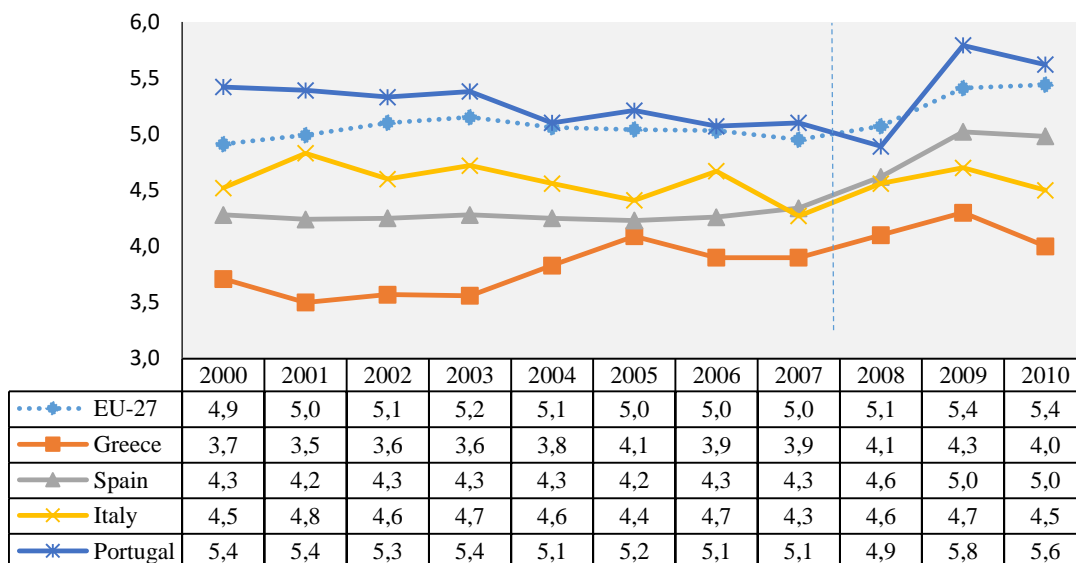
Source: Eurostat

Note: Data for Greece available only for 2001 (18,9%), 2002 (19,2%), 2003 (19,7%), 2004 (20,4%) and 2005 (22%).

When analyzing public expenditure on education as percentage of GDP (Figure 2.1.8), we can observe a slight diminished of expenditure in all countries, especially after 2009: Greece drops 0,3 percentage points, Italy and Portugal drop 0,2 p.p., Spain and the European average maintain the same value between 2009 and 2010.

Public expenditure as percentage of GDP was always higher in Portugal, and it had a significant increased between 2008 and 2009 in 0,9 percentage points (from 4,9 to 5,8%).

Figure 2.1.8 Public Expenditure on Education, as % GDP

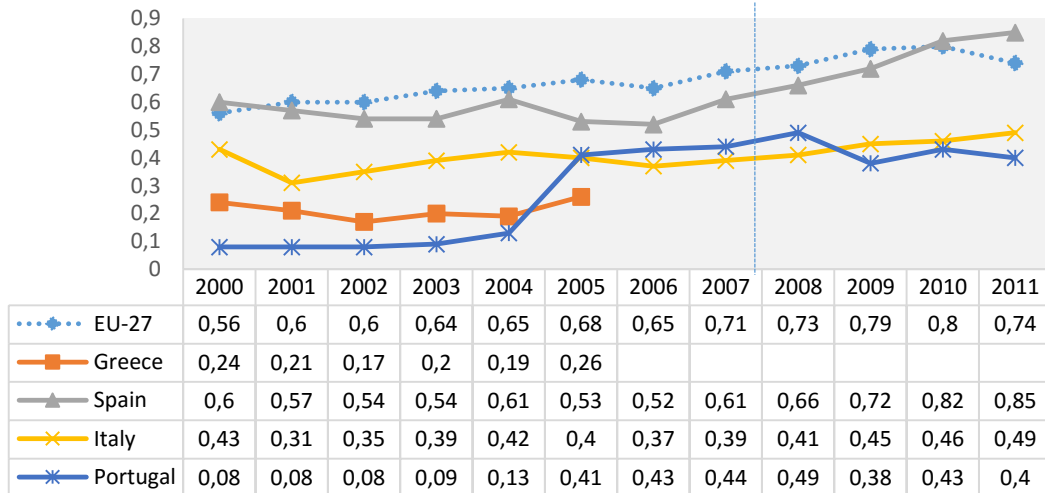


Source: Eurostat

Now looking in particular to private expenditure on education (Figure 2.1.9), it's possible to discern a slight stagnation trend in the last years in case of Portugal, after a

period of significant increasing after 2004 and 2005, where the indicator rose 0,28%. In case of Italy, and more pronouncedly, Spain, private expenditure has been increasing since 2006 – Italy increased 0,12 p.p. and Spain 0,33 p.p..

Figure 2.1.9 Private expenditure on education, as % GDP

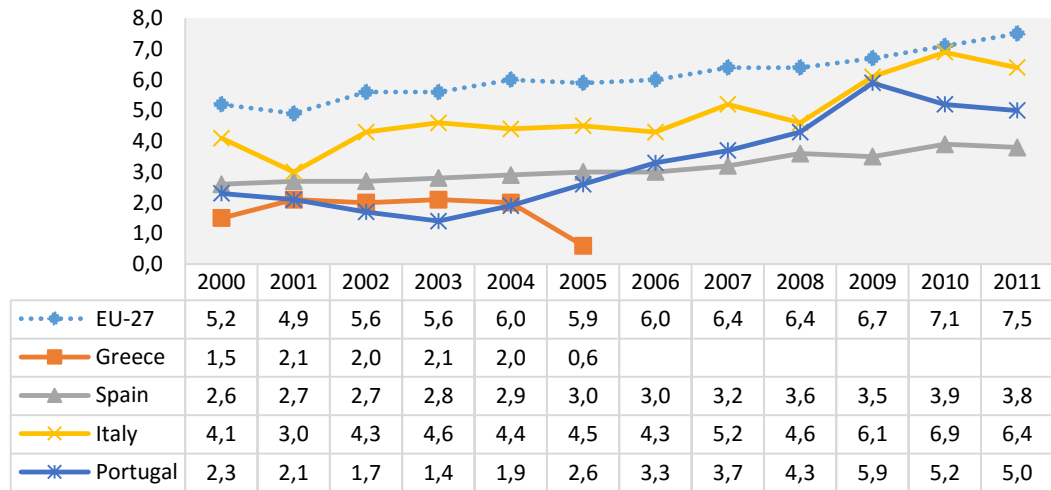


Source: Eurostat

Note: Private expenditure on education from private sources comprises school fees; materials such as textbooks and teaching equipment; transport to school (if organised by the school); meals (if provided by the school); boarding fees; and expenditure by employers on initial vocational training.

In Figure 2.1.10 shows the evolution of financial aid to pupils and students as percentage of total public expenditure on education, between 2000 and 2011. All four countries stay below the EU-27 average. Also regarding to this indicator, we observe a trend of diminish in the last years. That is more visible in the Portuguese case, where financial aid to pupils and students dropped from 2009 to 2011 0,9 percentage points (from 5,9% to 5%).

Figure 2.1.10 Financial aid to pupils and students as % of total public expenditure on education

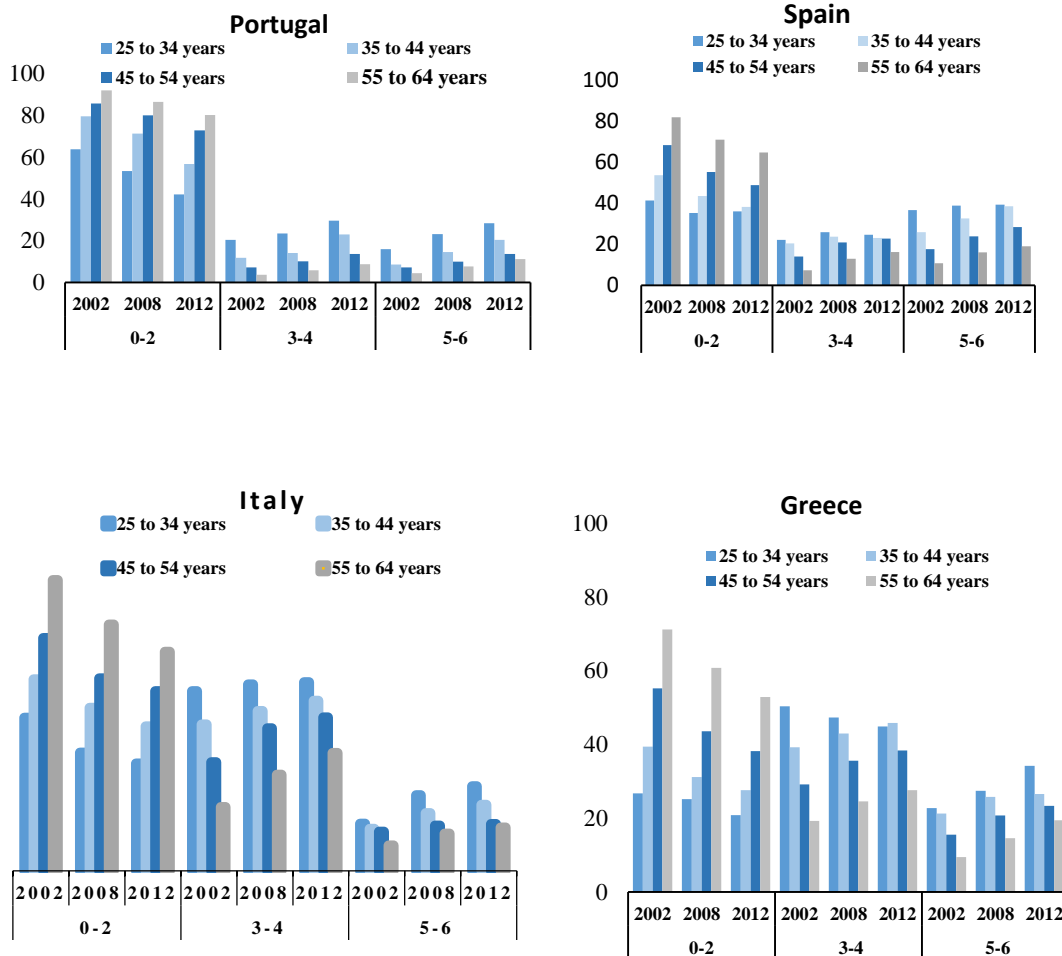


Source: Eurostat

Note: For all levels of education combined

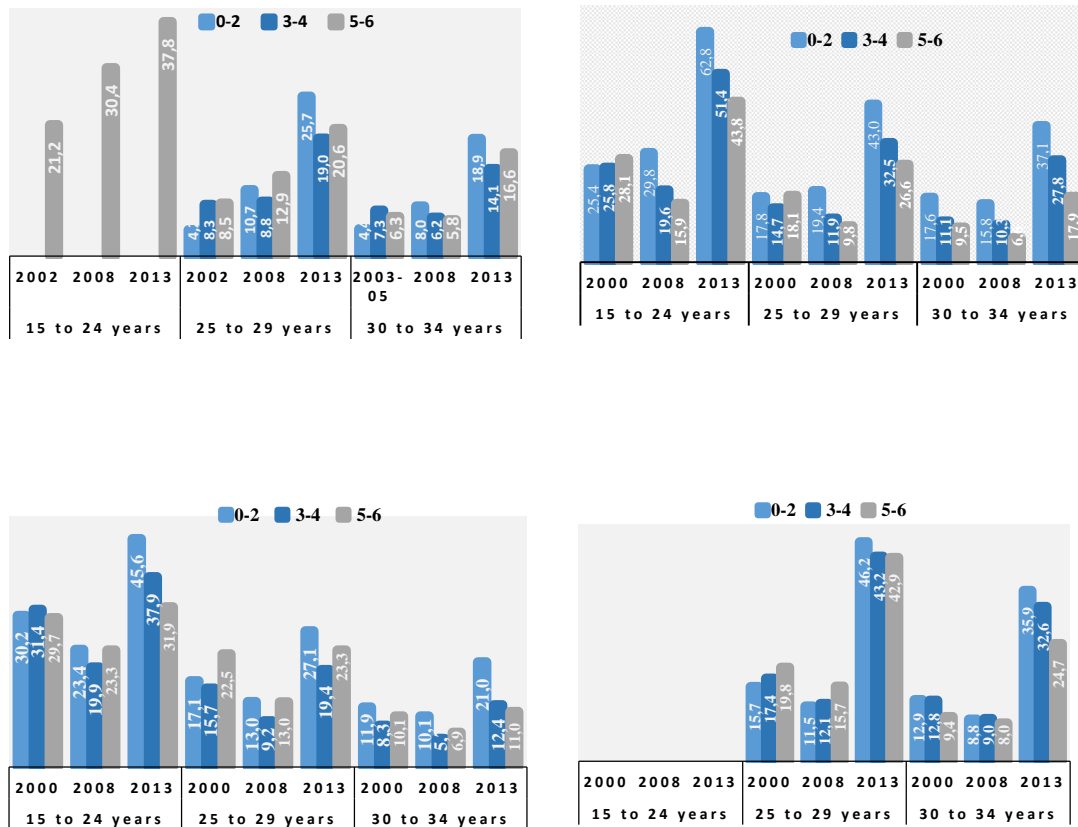
Annexes

Figure 2.1.2a Evolution of educational attainment (%), by ISCED and age (25-64 years), between 2000 and 2013, in Portugal, Spain, Italy and Greece.



Source: Eurostat

Figure 2.1.6a Evolution of the employment and unemployment rate (%), by age groups and ISCED, between 2000 and 2013, in Portugal, Spain, Italy and Greece.



Source: Eurostat

2.3 Southern Europe's educational systems

2.3.1 Educational Diagrams and structure

The following chapter will address the structure of mainstream education in the Southern countries from pre-primary to tertiary level. Based on the diagrams available by OCDE (Education GPS, 2012) and Eurydice (2015), we'll compare the main organizational models, taking also into consideration special needs and adult education.

Compulsory education

	ISCED 1	ISCED 2	ISCED 3
Portugal	Compulsory education (6 – 18 years old)		
Spain	Compulsory education (6 – 15 years old)		
Italy	Compulsory education (6 – 16 years old)		
Greece	Compulsory education (5 – 14/15 years old)		

A key starting point for such comparison is compulsory education. Portugal, Spain, Italy and Greece share a model of primary and lower secondary education (ISCED 1-2) of common core curriculum: “After successful completion of primary education (ISCED 1), all students progress to the lower secondary level (ISCED 2) where they follow the same general common core curriculum” (Eurydice, 2015:5).

In Portugal it was established since 2009 free compulsory education for students ranging from 6 and 18 years old. This period corresponds to basic and upper secondary education (from ISCED 1 to ISCED 3). Within the four, Portugal has the largest period of compulsory education (12 years). In Spain, since 1991, school is compulsory for students between the ages of 6 and 15, which corresponds to ten years of cost-free education, divided between primary education and secondary education (between 1st and 10th grade. In Italy, since the last extension act by Minister Fioroni (December 2006), the Italian

compulsory education has now a duration of ten years, starting at the theoretical age of 6 and ending at 16 years old, which means that it's expected that students finish at least the 11th year of the upper secondary education or, exceptionally, in a four year vocational training course (Cedefop, 2012).

The start of compulsory education in Greece is the earliest of the four country here in analysis: 5 years old, which is to say the second year of kindergarten. There are three different schools that make part of compulsory education: pre-primary, primary education and lower secondary school, till the age of 15. Compulsory schooling is 11 years (2 years attending pre-primary, 6 years attending primary and 3 years in lower secondary education).

The Portuguese case: an overview

In Portugal, 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), 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.

In brief, 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 that 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 basic education levels; students aged 15 – 18 who are early school leavers or risking delinquent behavior, have the Integrated Program for Education and Training 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 labor 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 Network). Finally, to tackle school drop-outs or retentions for youth aged 13 or more, a very recent 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).

The Spanish case: an overview

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. 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).

The Italian case: an overview

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 "leFP 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 leFP 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).

Pre-primary and primary education

Regarding pre-primary education (ISCED 0), Portugal and Italy share the same model: starting at age 3, children stay at pre-primary till they're 5 years old. After this three year period, there is a typical student flow to basic education (ISCED 1) – where compulsory education starts². Differing slightly, Spain and Greece's early childhood education is grouped into two programmes, one designed for younger children between 0 and 2 years, and the other for children between age 3 and 5.

With regard to primary school (ISCED 1), Spain and Greece continue to have a similar model, meaning primary school comprises 6 years (starting age 6); Italy's primary school ends in the 5th year, usually when children have 10 years old and the Portuguese basic education is divided into 1st cycle (1st to 4th) and 2nd cycle (5th and 6th).

With exception of Italy, where general lower secondary education (ISCED 2), has the starting age of 11 years and includes the 6th to 8th grade, the usual starting age for the remaining countries is 12 years (from 7th to 9th grades). Yet, we should highlight the fact that for Portugal, vocational/professional orientation is offered has an alternative starting in this point, for children between 12-14 years old, and has a duration of three years (7th-9th grade).

General and vocational secondary education

The greatest dissimilarities amongst these education systems start after upper secondary school (ISCED 3). The Portuguese general upper secondary education starts at age 15 and ends at the theoretical age of 17/18 (from 10th to 12th grade). The Greek model is similar, but there is the possibility to do part-time attendance extending up to 13th grade. In Italy, has seen before, upper secondary starts early, at 14 years old and ends at age 18 (from 9th to 13th grade).

² Pre-primary education in Portugal is the first step of the Education System in a lifelong learning process, being an optional cycle for children from 3 to 5 year-olds, where in the universality is enforced as a State guarantee for those 5 years or older. 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.

In the Spanish model, compulsory secondary education is divided between two stages: a lower (ISCED 2) (from 7th to 9th grades) and an upper (ISCED 3), that corresponds just to the 10th grade. In this stage we find students commonly with 15 years old and it marks the finishing point of compulsory education. For the Spanish student that wish to continue their studies, there is a typical student flow to general upper secondary education (from 11th to 12th grade) or to vocational education (also two years) (vocational training intermediate level). After this point, students can access to University or specific vocational training. After the 10th grade, students can also choose to enroll in a Music and

The Spanish case: from compulsory to non-compulsory education

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.

Dance Professional Studies and Languages Studies (11th to 12th) that gives entitlement to a professional diploma.

In Portugal, the upper secondary education for vocational/professional orientation (ISCED 3) is basically the continuation of the vocational lower secondary education courses (although students that were in the vocational courses at the lower stage can enroll in general upper secondary)³. As it happens in general upper secondary education, the theoretical starting age is 15 years old and it has a duration of three years (from 10th to 12th). This stage also gives access to higher education (technological specialization courses (ISCED 4), University or Polytechnic (ISCED 6)).

In Greece, from lower secondary school (Gymnasium), students can enroll in vocational upper secondary school (EPAL), with 15 years old, which corresponds to 10th to 12th grade (13th if made by part-time). At 11th grade there could be a transfer from General

³ Vocational upper secondary offers technological, specialised artistic, vocational, apprenticeship and education and training courses and non-dual vocational courses.

Lyceum or EPAL to Vocational training school (EPAS) - which is only going to be active until 2016 – and, after two years, students would be entitled to a graduation certificate. Vocational/professional education in Italy is also divided into three programmes: technical education (9th to 13th) and vocational education (9th to 13th) – both giving access to higher education, and vocational training and education (9th to 12th), that gives access to Higher Technical Education and Training (IFTTS) (ISCED 4), where students are entitled after 1 year, a certificate of higher technical specialisation.

The Greek case: an overview

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.

Access to higher education

The access to higher education (ISCED 6) in Portugal happens after completion general or vocation upper secondary education, but also after a one/one and half year of Technological specialization courses (ISCED 4) (which implies students have at least 18 years old and have completed secondary education). Then, higher education takes places in two institutions: Universities and Polytechnics - both conferring bachelor's degree (*licenciatura*). In Universities, bachelor's degree usually have a duration of 3 years, after which students are applicable to a master course (in the case of courses with integrated master's, is 6 years). There's also bachelor's with 4 years, that also gives access to master's (the 3rd year is a recognized exit point, but not allowing access to master's). In Polytechnics, the duration of a bachelor course is 4 years and gives access to master's (being the 3rd year a recognized exit point of the education system). Master's have a duration of two year and both are recognized exit points, but only after the second year

students are applicable to proceed to the doctorate (that varies between 3 to 4 years). The theoretical age for starting a doctorate is between 23-27 years.

In Spain, 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. Tracking for higher education happens 1) through general upper secondary education (after completion of 12th) that gives access to University (students generally have 18 years old); 2) through vocational training (after completion of 12th), which gives access to Specific Vocational Training (ISCED 5), student theoretically have 18 years old. In this case, students can be applicable to access University after year 2 (which confers the vocational training advanced level degree). At University, the Spanish system have long studies - 6 years, gives access to doctorate after the 5th and 6th year – and first degree - 3 years, doesn't give access to master's, but in the third year students can transfer to the 4th year of long studies. There's also a regular bachelor's degree of four year (only the 4th year is a recognized exit point of the education system), and it gives access to Master's (generally at age 22), with a duration of 2 years, but only after the second year students are applicable to proceed to the doctorate (4 to 6 years).

In Italy, upper secondary education (general, technical or vocational) gives access to University, Tertiary-level Arts/Music Education (AFAM) and Higher Technical Institutes (ITS) (ISCED 5) – that afterwards doesn't allow access to university. University education starts at a theoretical age of 19 years old, at it is divided between integrated master's of 6 years (ISCED 7), that can continue to a second level graduate diploma (2 years), or a specialisation degree (6 years), or a doctoral degree (PhD) (3 years) (ISCED 8). University education also includes a bachelor's degree of three years (ISCED 6), that can continue to a one year first level graduate diploma (ISCED 6) or continue to a master's degree (of two years) (ISCED 7), that gives access to the same degrees of an integrated master's course (including a PhD).

In Greece, general upper secondary school (general lyceum) and vocational education (EPAL) gives access to a) University/Technical university, b) Technological Educational

Institute and, finally, c) Non-university Institution of Higher Professional Education (ISCED 6). The latter two are vocational and only b) gives access to Master's degree (from vocational institutions, TEI), and then to doctorate. University and Technical University is divided between, 4 years for a regular bachelor's degree, 5 years for a bachelor's degree in engineering, agricultural sciences, veterinary, dentistry or pharmacology and, thirdly, bachelor's degree in medicine. The latter two, give access to Master's degree (from vocational institutions, TEI) or to Master's degree from tertiary university institution (AEI), and, consequently, after year 2, doctorate (with a duration of 3 years), with a theoretical starting age of 24-26.

2.3.2 Pupils, teachers and schools - numbers and statistics

Over the last decade, for all the countries here in analysis, indicators of participation in education, number of students, the enrolment rate, teachers and academic staff, witnessed an overall improvement.

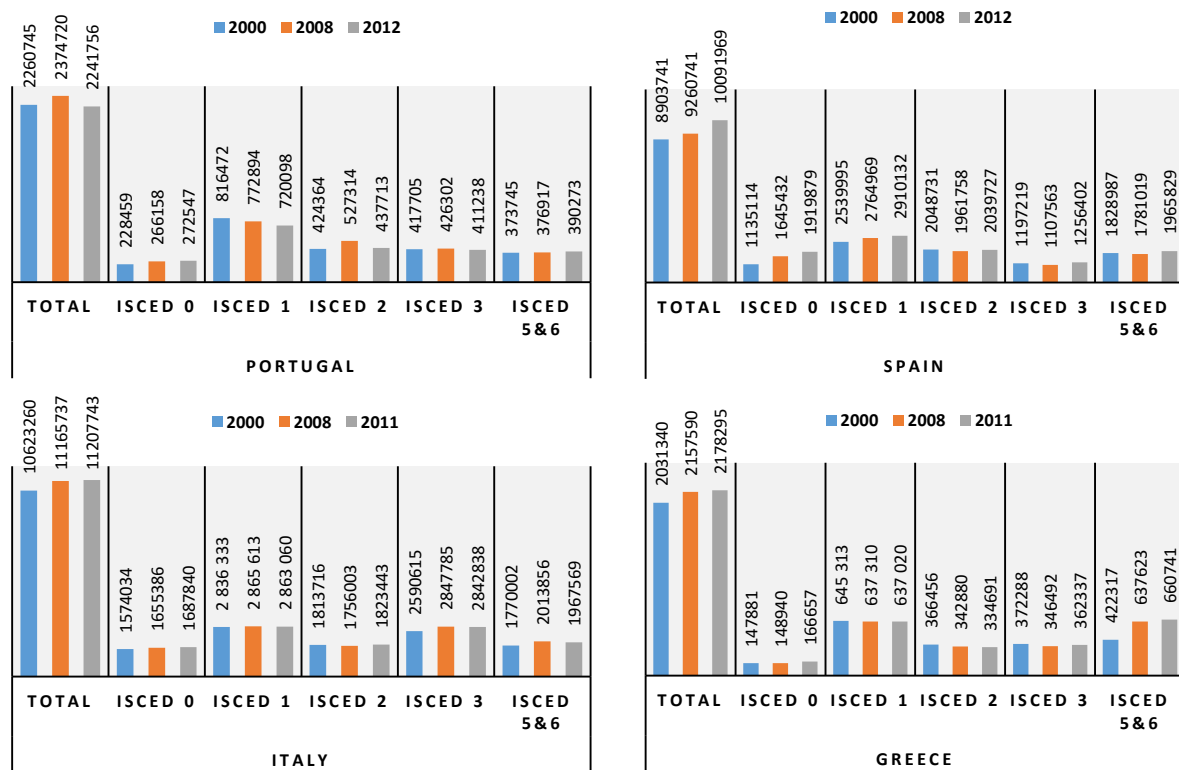
Figure 2.2.1 shows the evolution of the number of students between 2000 and 2011/2012. The country that between this period had the biggest increased in the total number of students was, undeniable, Spain (from 8 million to 10 million, a growth of 13,3%). Also, the number of student increased slightly in a more significant way in Greece in the same period considered (from 2 031 340 to 2 178 295, a growth of 7,2%) then in Italy (from 10 to 11 million, increasing 6,4%). On the contrary, Portugal between 2000 and 2012, decreased the number of student for about 19 thousand students (-0,84%). A more detailed analysis show that the behavior of this indicator for Portugal has been of reduction since 2009 (from 2.4 million to 2.2 million in 2012, less 193 909 students overall).

Looking at this evolution in regards to the level of education in Spain, only lower secondary education (ISCED 2) registered a decrease from 2000 to 2012 (less 9 004 students). In Portugal, there was a diminution of students in primary education (ISCED 1) - a trend that has been happening since the beginning of the decade – and in upper secondary (ISCED 3) – where the number of students has been reducing since 2009 (498 327) till 2012 (411 238) – a reduction of 21%⁴. In regards to Greece, there was a reduction between 2000 and 2012 in primary education (ISCED 1) (-8 293), lower

⁴ Inversely to this trend, the number of students with post-secondary education between 2003 (638) and 2012 (9 887) is almost fifteen times higher.

secondary (ISCED 2) (-31 765) and in upper secondary (ISCED 3) (-9 951). Italy is the only country for the period considered that was felt an improvement. However, when we look at the behavior of this indicator in recent times, we see that the total of students in tertiary education (ISCED 3) has been reducing since 2007 (2 033 642) till 2011 (1 967 569) (See annexes, Figure 2.2.1a).

Figure 2.2.1 Number of student's evolution in Portugal, Spain, Italy and Greece, by level of education, between 2000 and 2012.



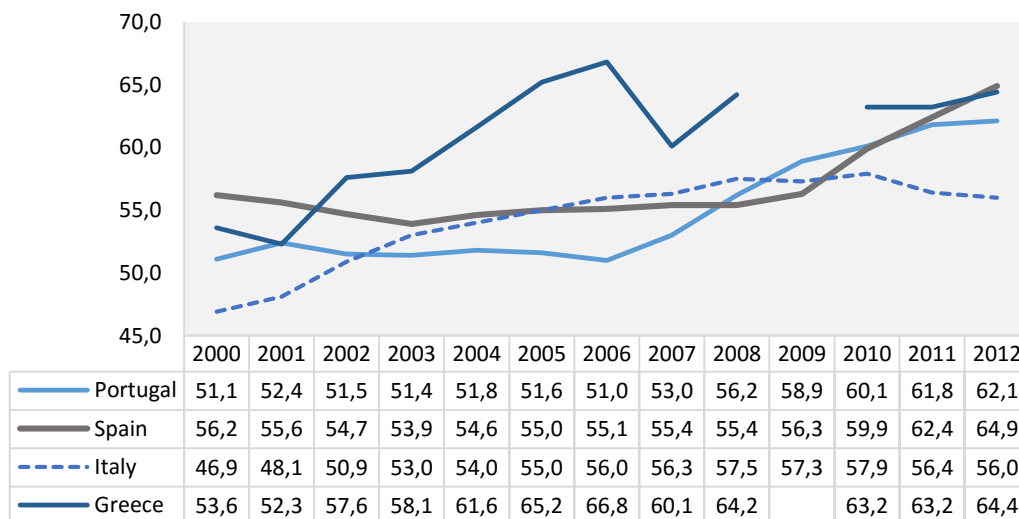
Source: Eurostat

Note 1: ISCED 0 (Pre-primary education), ISCED 1 (Primary education); ISCED 2 (Lower secondary); ISCED 3 (Upper secondary education); ISCED 5&6 (Tertiary education).

Note 2: Post-secondary non-tertiary education (level 4) values, for 2000 and 2012 are – Portugal (2003=638; 2012=9 887); Spain (no data available); Italy (2000=38 560; 2011=22 993); Greece (2000=77 085; 2011=11 932).

In figure 2.2.2 presents the evolution between 2000 and 2012 of the student's enrolment, between primary (ISCED 1) and tertiary education (ISCED 6). During the period considered, Portugal presented the highest rise in this indicator – improved from 2000 to 2012, 11 percentage points (from 51,1% to 62,1%). However, after a period of significant rise (since 2007) in the last two years the pace of growth slowdown. The next country with the highest improvement in students enrolment was Greece - more 10,8 percentage point (from 53,6% to 64,4%). In the beginning of the decade, although Spain had the largest percentage of students enrolled (56,2%), between 2000 and 2003 the indicator reduced 2,3 percentage points. Since then, Spain has been recovering (especially after 2010), and in 2012, reached 64,9% of participation, surpassing Greek's value slightly. In the Italian case, although between 2000 and 2012, the country showed signs of improvement in this indicator (more 9,1 percentage points, from 46,9% to 56%), the last two years the number of students enrolment dropped by 2 p.p..

Figure 2.2.2 Participation/ enrolment in education of students between primary (ISCED 1) and tertiary education (ISCED 6), as % of corresponding age population (15 to 24 years old).



Source: Eurostat

When we compare the differences between gender, we conclude that in all countries female enrolment was always higher, but it was in Italy where females participation in education, in total, had the most significant improvement (more 10,9 p.p.), followed by Greece (more 10,3 p.p.). The male participation also increased, and in this regard Portugal stands out with an increase of 12,9 percentage points between 2000 and 2012 (see annexes, Figure 2.2.2b). This improvement is, as expected, also more significant in individuals aged 16-18 (see annexes, Figure 2.2.2c). Between 2000 and 2012, for this group age, Portugal had the largest improvement – 17,6 percentage points (from 71,8% to 89,4%). We should also note the improvement in Greece for the students with 24 and 26 years (where the percentage of enrolment almost tripled).

Table 2.2.1 Number of teachers and academic staff evolution in Portugal, Spain, Italy and Greece.

	<i>Portugal</i>	<i>Spain</i>	<i>Italy</i>	<i>Greece</i>
2000	159 290	638 815	876 101	:
2001	158 493	662 213	908 002	:
2002	162 416	672 765	909 923	:
2003	201 007	680 168	906 273	:
2004	202 269	697 608	902 241	189 128
2005	218 957	711 199	831 637	194 648
2006	219 426	723 852	837 363	201 174
2007	209 907	748 692	867 811	202 014

2008	214 425	773 817	880 243	:
2009	216 428	808 181	881 067	:
2010	219 569	818 231	830 018	:
2011	216 939	826 477	808 482	:
2012	203 826	826 598	:	:

Source: Eurostat

Note 1: : - data not available

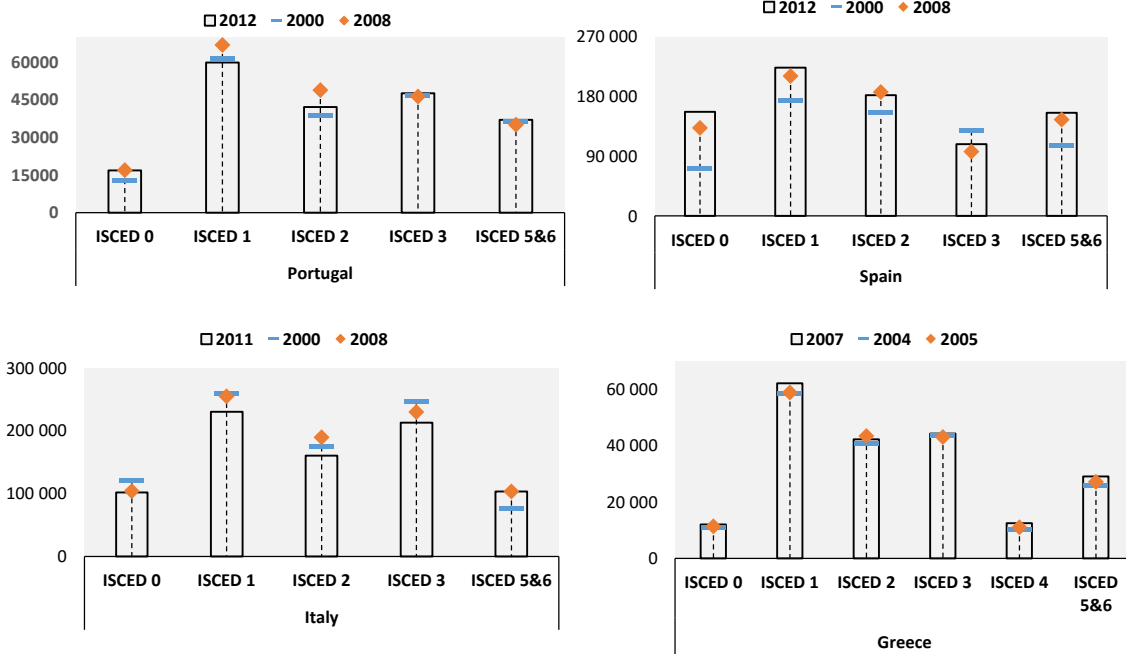
Note 2: Teachers (ISCED 0-4) and academic staff (ISCED 5-6).

Table 2.2.1 presents the number of teachers and academic staff evolution in Portugal, Spain, Italy and Greece. Taking in consideration the period analyzed, Portugal has more 44 536 teachers and academic staff in 2012 since 2000. However, in recent years, namely after 2010, there has been a tendency of decrease, and in 2012 the number of teachers and academic staff (203 826) were the lowest since 2004 (202 269). Also Spain had a significant rise of the number of teachers and academic staff between the last decade – more 187 783, of which the most substantial growth happened between 2000 and 2009 (26,5%, meaning more 169 366 teachers and academic staff). Contrary to Portugal and Spain, Italy saw the number of teachers and staff be reduced between 2000 and 2012 in 67 619 individuals. After 2009 (881 067), this indicator had a continuous decline and in 2011 (808 482) reached the lowest number of teachers and academic staff the country ever had along with the period considered. In Greece, taking into consideration this indicator, there is only information since 2004 to 2007 that show some increase, hence there is no possibility for comparison with the other countries progress.

Now according to the level of education (Figure 2.2.3), it's with no surprise taking into consideration what we observed before, that in Italy, for all education levels (with

exception to tertiary education), the numbers of teachers and academic staff dropped, especially, in upper secondary education (ISCED 3) – less 33 765 individuals – and primary education (ISCED 1) – less 28 463. In Portugal, the number of teachers in primary education (ISCED 1) also decreased along the decade by 1 551. In the other levels of education the number of teachers increased, particularly, in pre-primary (more 4 333) and lower secondary (more 3 596). Nevertheless, when we compare the period between 2008 and 2012, it's possible to observe in Portugal a diminution of teachers in pre-primary (less 403), primary education (less 7 001), and lower secondary (less 6 770). At last, in Spain only in upper secondary (ISCED 3) was observed a drop of teachers between the diachronic period in analyses (less 20 674). The major increase was felt in pre-primary education where the number of teacher went from 71 966 to 157 142 in twelve years (more 85 176 teachers). Between 2008 and 2012, we should highlight the decreased in the number of teachers (less 4 998) for lower secondary education.

Figure 2.2.3 Number of teachers and academic staff evolution, by ISCED levels, in Portugal, Spain, Italy and Greece, between 2000 and 2012.



Source: Eurostat

Note 1: Teachers (ISCED 0-4) and academic staff (ISCED 5-6).

Note 2: ISCED 0 (Pre-primary education), ISCED 1 (Primary education); ISCED 2 (Lower secondary); ISCED 3 (Upper secondary education); ISCED 5&6 (Tertiary education).

2.4. Special Education

Special Need Education in Portugal

In Portugal, Since 1996/97 handicapped pupils with special needs of education 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 regulation fruitful in creating the conditions for universal access and support for the children/youngsters 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 Special Education through the Resource Centers for Inclusion (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 Plans (PEI) and Specific Individual Curriculum (CEI), compulsory in all schools. With the National Strategy for Disability for 2011-2013 (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 2.2.2). 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 2.2.3).

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 2.2.5). Moreover, exception within this disinvestment has been also the early 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, CNE Technical, 2013: 24- 26).

Table 2.2.2 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
<i>2009/2010</i>	132 (*)	637	13 211
<i>2010/2011</i>	129 (*)	637	14 099
<i>2011/2012</i>	109 (*)	551	12 868
<i>2012/2013</i>	107 (*)	558	13 696
<i>2013/2014</i>	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 2.2.3 Number of Resource Centres for Inclusion (CRI - Centro de Recursos para a Inclusão), supported organizational units (UO – Unidades orgânicas apoiadas) and number of students with SEN covered, by NUTS 2 regions. 2013/2014

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

Source: Adapted from CNE Estado de Educação (2013), pp.125, Table 3.2.2. (Tabela 3.2.2.)

http://www.cnedu.pt/content/edicoes/estado_da_educacao/Estado-da-Educacao-2013-online-v4.pdf

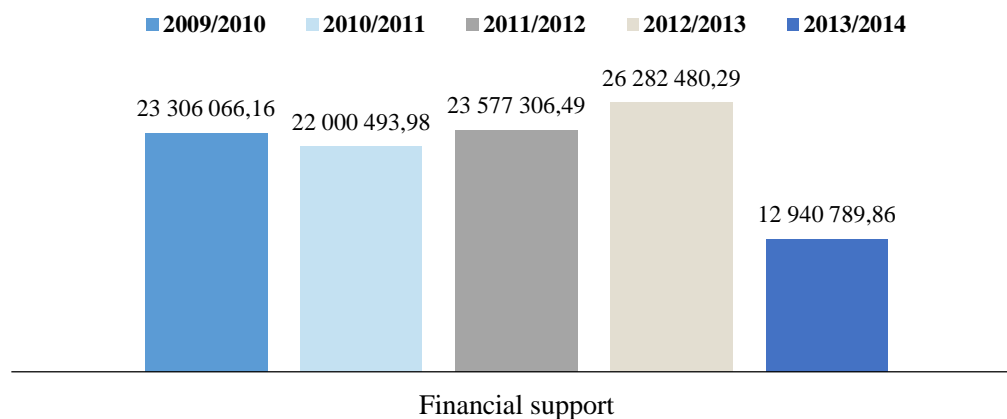
Note: (*) Inclui projetos de parceria ao abrigo da Portaria nº 1102/97, de 3/11

Table 2.2.4 Applicants and holders (No.) of financial allowances for special education, by NUTS 2 regions, between 2009 and 2014

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

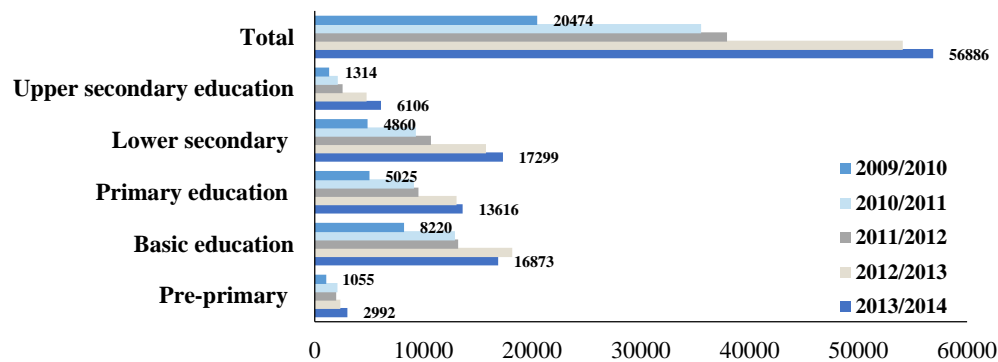
Source: Adapted from CNE Estado de Educação (2013), pp.129, Table 3.2.5 (Tabela 3.2.5)
http://www.cnedu.pt/content/noticias/CNE/RelatorioTecnico_profducal.pdf

Figure 2.2.4 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 2.2.5 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).

Special Needs Education in Spain

In Spain, the educational system has 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.

Table 2.2.5 Percentage of students with Special Educational Needs in Spain, in 2012-2013

	<i>Total</i>	<i>Pre- primary</i>	<i>Primary education</i>	<i>ESO</i>	<i>PCPI</i>	<i>Bachillerato</i>	<i>FP</i>
<i>Public schools</i>	2,1	0,9	2,2	2,4	7,8	0,3	0,5
<i>Government dependent private schools</i>	2,3	1,1	2,6	2,6	6,9	0,3	0,5
<i>Independent private</i>	0,3	0,2	0,3	0,3	3,0	0,3	0,2
<i>Males</i>	2,7	1,1	2,9	3,0	7,5	0,4	0,6
<i>Females</i>	1,5	0,6	1,5	1,8	8,6	0,2	0,5

Note: ESO = lower secondary education; Bachillerato = upper secondary education; FP = Vocational training.

Special Needs Education in Italy

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 promulgated ; 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.

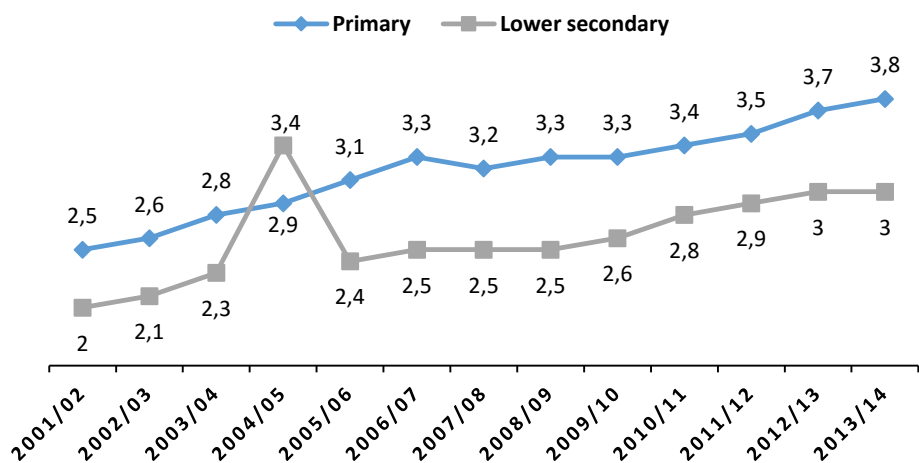
The more recent data issued by Istat (2014), students with disabilities in the compulsory education are more than 150.000, whose 56.6% in primary school and the rest in the lower secondary school (year 2013/14). They have increased by 1.000 students since last year, confirming a trend registered in the 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).

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. Regions with the higher incidence rates of disable 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 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).

Figure 2.2.5 Percentage of students with disability per level and scholastic year (2001/02-2013/14)



Source: Istat-Miur

Table 2.2.6 Students with disabilities per regional area and kind of dependency (2013/14), in Italy

	Dependent for moving	Dependent for going to the bathroom	Dependent for eating
	Primary school		
<i>North</i>	10,6	15,4	7,7

<i>Center</i>	13,4	18,1	9,8
<i>South</i>	16,7	25,4	11,5
Italy	13,3	19,5	9,5
Secondary school			
<i>North</i>	8,1	9,0	4,6
<i>Center</i>	10,9	12,0	5,7
<i>South</i>	14,8	18,6	7,9
Italy	11,0	12,9	6,0

Source: Istat-Miur

Special Needs Education in Greece

Students with disabilities attend schools set up for this purpose since 1996, prior to this, there were schools being set up by civil society organisations. No other data was presented considering this particular subject.

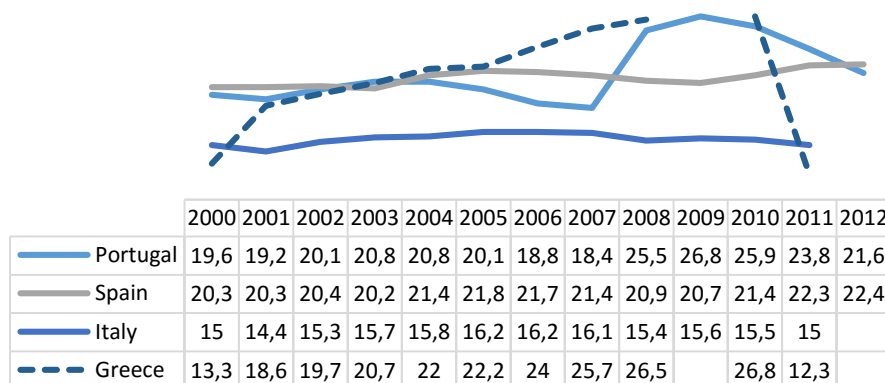
2.4 Adults education

ISCED 1	ISCED 2	ISCED 3	ISCED 4
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Portugal	Adult education (from 1 st to 12 th grade)	
Spain	Adult education (from 1 st to 11 th grade)	
Italy	Adult education (from 1 st to 12 th grade)	
Greece	Adult education (from 1 st to 9 th)	

In regards to adult education, Portugal and Italy have the largest period, ranging from 1st to 12th grade, followed by Spain, which adult education extends till 11th grade, and Greece where adult education is formally just from 1st to 9th grade.

Figure 2.2.6 Percentage of adult students in total, in Portugal, Spain, Italy and Greece, 2000-2012



Source: Eurostat

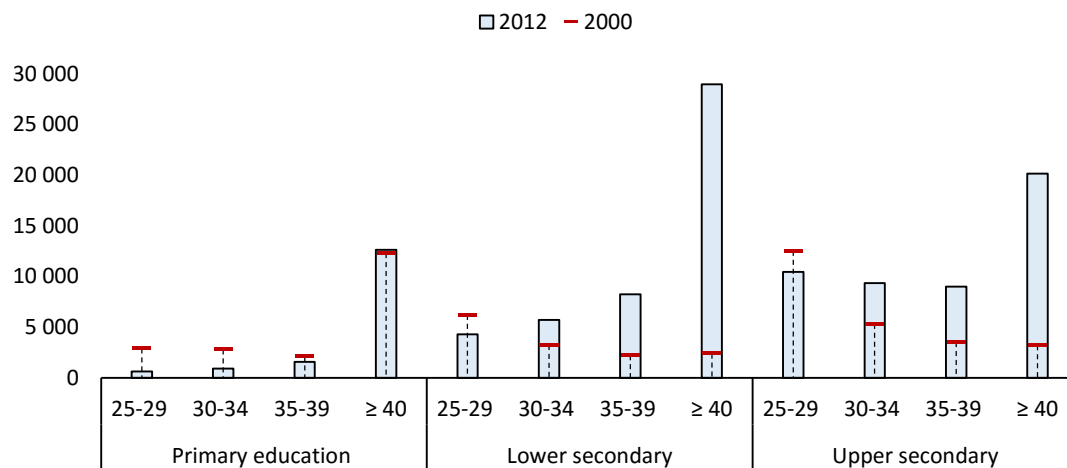
Note: Greece, 2009 – data not available

In Figure 2.2.6, it is presented the evolution between 2000 and 2012 of the percentage of adult students for all levels of education. At 2011, Portugal had the highest percentage of adult students (23,8%), followed by Spain (22,3). The latest results of 2012 show that

Portugal drops 2,2 percentage points (to 21,6 p.p.), and Spain increases (0,1 p.p.). Between 2007 and 2009 Portugal had a significant increase in this indicator - 8,4 percentage points (from 18,4 to 26,8), being the biggest growth identified along with the period analysed and in comparing to the rest of the southern countries. In 2000, Greece had the lowest percentage of adults students (13,3). Since then, the country had a major recuperation in the indicator, increasing 7,9 p.p. between 2001 and 2008. However, in the latest years we observe a reversal of this period of growth - specially between 2005 and 2008 – and the percentage of adult students dropped 14,5 percentage points. In Italy, the evolution in this indicator was stagnant – in 2000 and in 2012 it remains in 15%, although there has been a decline since 2006 in 1,2 percentage points.

In Portugal, the number of students with 40 years or above attending lower secondary increased from 2 403, in 2000, to 28 961, in 2012 (more 26 558). These incensement was observed specially after 2008 (56 705). However, in the last two years, the number of adult students decreased by half – from 41 456 (in 2011) to 28 961 (in 2012). Also in upper secondary it's observed an increase of students with 40 years or more, namely there are more 16 914 in 2012 then there was in 2000 (3 226). Also in this level of education it's observed a changing shift: around 2008, the number of adults had an astonishing rise from the year before -more 29 181 students (from 5244, in 2007, to 34 425, in 2008). However, since 2008/2009, the number have been decreasing (Figure 2.2.6a).

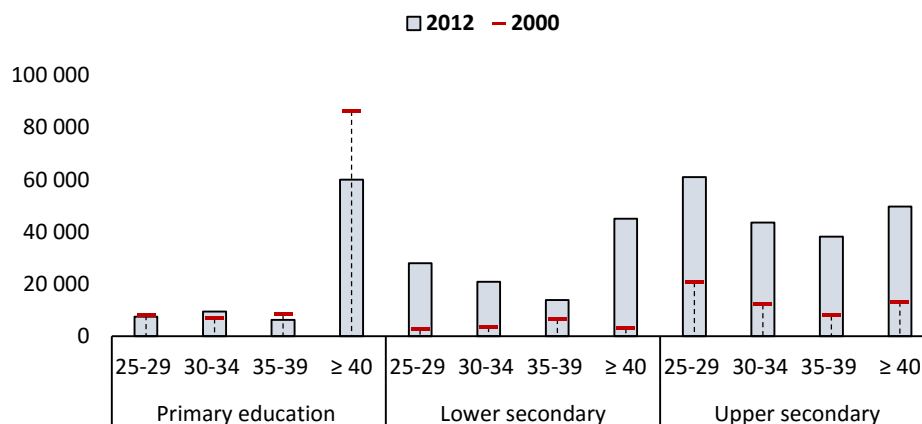
Figure 2.2.6a. Evolution between 2000 and 2012, of the number of adults studding in Portugal, according to age groups.



Source: Eurostat

In Spain, the number of students with 40 years or above attending lower secondary and upper secondary also had a significant and continuous increase, respectively, in lower secondary from 3 134, in 2000, to 45 050, in 2012 (more 41 916 students) and in upper secondary, from 13 241 to 49 657 (more 36 416 students). Inversely, students with 40 years or above in primary education reduced from 86 325 in 2000 to 60 019 in 2012 (less 26 306 students) (see Figure 2.2.6b).

Figure 2.2.6b. Evolution between 2000 and 2012, of the number of adults studding in Spain, according to age groups.

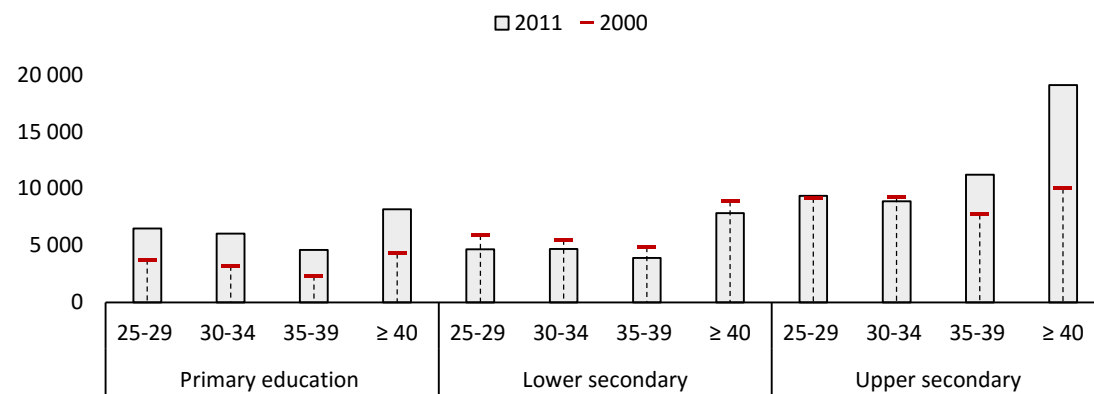


Source: Eurostat

Note 1: Primary education – in reference to 2004 (data of 2000 was not available).

In Italy, it's observed a situation rather different, the number of students with 40 years or above attending primary education increased between 2000 and 2011, from 4284 to 8186 (more 3 902 students) and the number of students with 40 years or above reduced in lower secondary education (less 1 065). The biggest rise for this group age happened for students attending upper secondary education: from 10 022, in 2000, to 19 115, in 2012 (more 9 093 students) (Figure 2.2.6c).

Figure 2.2.6c. Evolution between 2000 and 2012, of the number of adults studding in Italy, according to age groups.

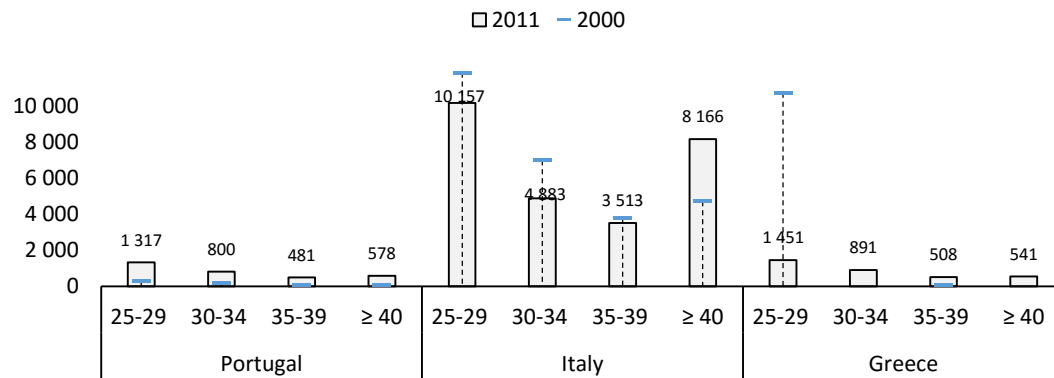


Source: Eurostat

Note 1: Primary education and lower secondary – in reference to 2005; Upper secondary – in reference to 2002.

With Figure 2.2.2d we observed the evolution of the number of adults studding in post-secondary in Portugal, Italy and Greece (for this level of education, there was no data available for Spain). In Portugal, for all group ages here considered, the number of students in post-secondary, between 2000 and 2011, increased. In Italy, that behavior was only observed in ≥ 40 years old (more 3 460 students) and in Greece also for older age groups this number grew. But it should be stressed that in the Portuguese case, the age group that saw a bigger increase in this level of education was the “25-29” – which in the other countries reduced significantly.

Figure 2.2.2d. Evolution between 2000 and 2012, of the number of adults studding in post-secondary in Portugal, Italy and Greece, according to age groups.



Source: Eurostat

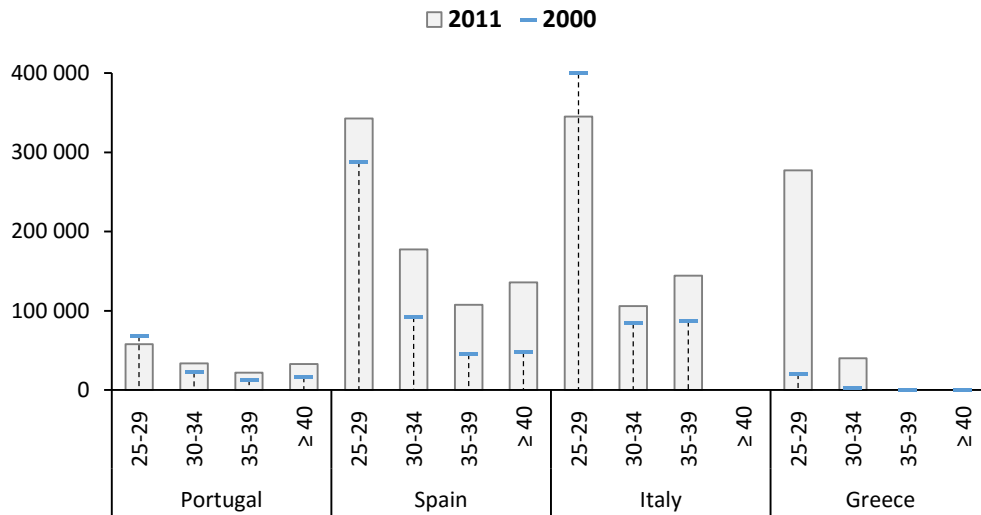
Note 1: Data not available for Spain.

Note 2: Data for Portugal, in 2000: 25-29 (304); 30-34 (190); 35-39 (66); ≥40 (56); Data for Greece, in 2000: 35-39 (80);

Note 3: Portugal, 25-29, in reference to 2005; Italy, 25-29, in reference to 2003, and ≥ 40 in reference to 2010.

Finally, in regards to tertiary education (Figure 2.2.2e), the case that most stands out is Greece, namely, for the younger age group “25-29”, where between 2000 and 2011, the number of adult students rose from 20 120 to 277 200 (more 257 000 students). In the other countries we also observe an increase of adult student attending tertiary education with 40 years old or more: Portugal increased this number in 16 000 (from 16 2111 to 32 613), Spain increased in 88 126 (from 47 736 to 135 862) and Italy increased in 57 939 (from 86 451 to 144 390). In Italy the number of students between 25 and 29 reduced significantly (less 54 425, from 399 738 to 345 313).

Figure 2.2.2e Evolution between 2000 and 2012, of the number of adults studding in tertiary education (ISCED 5&6) in Portugal, Spain, Italy and Greece, according to age groups.



Source: Eurostat

Note: Greece, 35-39 and ≥ 40 data for 2011 not available

Annexes

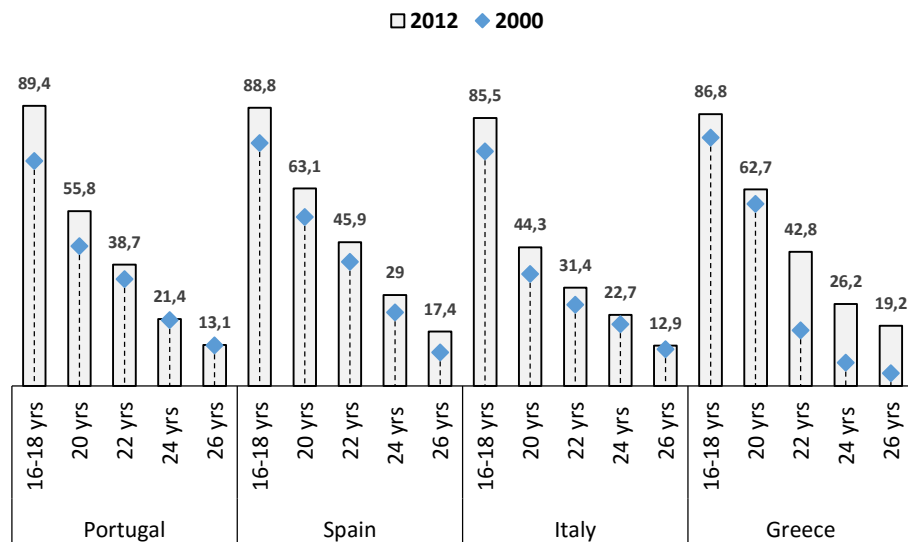
Portugal							
	ISCED 0	ISCED 1	ISCED 2	ISCED 3	ISCED 4	ISCED 5	ISCED 6
Educational System	Theoretical start/ending age: between 3 and 5 years old.	Theoretical start/ending age: between 6 and 9 years old.	Theoretical start/ending age: between 12 and 14 years old.	Theoretical start/ending age: between 15 and 18 years old.	Theoretical start/ending age: 18 years old	Theoretical start/ending age: 18 years old	
	Pre-primary education: 3 years of duration;	Primary education, 1st cycle 4 years of duration (1st, 2nd, 3rd, 4th);	Lower secondary education: 3 years of duration (7 th , 8 th , 9 th);	General upper secondary school (scientific-humanistic courses): 3 years of duration (10 th , 11 th , 12 th);	Technological specialization courses: year 1-1.5	University education Bachelor's degree 3/4 years of duration; Master's degree more 2 years Master's degree 6 years of duration Polytechnic Bachelor's degree 3/4 years of duration; Master's degree more 2 years	
		Theoretical start/ending age: between 10 and 11 years old.		Vocational upper secondary education (technological, specialised artistic, vocational, apprenticeship and educational and training courses): 3 years of duration (10 th , 11 th , 12 th);		Doctorate level (PhD) 3/4 years of duration Year	
	Compulsory education (6 – 18 years old)						
Adults education	Between basic education and upper secondary (12 years)						
Special needs education	No information for special needs education						

Spain							
	ISCED 0	ISCED 1	ISCED 2	ISCED 3	ISCED 4	ISCED 5	ISCED 6
Educational System	Theoretical start/ending age: between 2 and 5 years old	Theoretical start/ending age: between 6 and 11 years old	Theoretical start/ending age: between 12 and 16 years old	General upper secondary school: 2 years of duration (11th, 12th); from 16 years old on.		Theoretical starting age: 18 years old	
	Pre-primary education: 4 years of duration;	Primary education: 6 years of duration (1st, 2nd, 3rd, 4th, 5th, 6th).	Lower secondary education: 4 years of duration (7th, 8th, 9th, 10th).	Vocational training (intermediate level): 2 years of duration (11th, 12th); from 16 years old on. There's a student flow from this level to vocational training advanced		University <ul style="list-style-type: none"> Long Studies: 5/6 years of duration; the 5th and 6th year is a recognized exit point of the education system. After the 6 year student can flow to doctorate. First degree: 3 years of duration. After the year 3, student can flow to year 4 of the long Studies. Bachelor's: 4 years of duration; Year 4 is a recognized exit point of the education system and gives access to master's. Master's: 2 years of duration 	
				Initial vocational training: 2 years of duration (11th and 12th years).		Specific vocational training (advanced level): 2 years of duration. The year 2 is a recognized exit point of the education system and gives access to the first year of bachelor's.	
	Compulsory education (6 – 16 years old)						Doctorate level 6 years of duration Year 4, 6 and 5 is a recognized exit point of the education system
Adults education	Between primary school and ISCED 3 (12 years)						
Special needs education	Between pre-primary and ISCED 3 (16 years)						

Italy							
	ISCED 0	ISCED 1	ISCED 2	ISCED 3	ISCED 4	ISCED 5	ISCED 6
Educational System	Theoretical start/ending age: between 3 and 5 years old.	Theoretical start/ending age: between 6 and 10 years old.	Theoretical start/ending age: between 11 and 13 years old.	Theoretical start/ending age: between 14 and 18 years old.		Theoretical start/ending age: 19 years old	
	Pre-primary education: 3 years of duration;	Primary school: 5 years of duration (1st, 2nd, 3rd, 4th, 5th);	Lower secondary school: 3 years of duration (6th, 7th, 8th);	General upper secondary school: 5 years of duration (9th, 10th, 11th, 12th, 13th);	Higher Technical Institutes (ITS): 2 years of duration; from 19 to 20 years old;	University education Bachelor's degree 3 years of duration; Master's degree (+2 years) Master's degree (6 years) First level graduate diploma (1 year) Second level graduate diploma (+2 years) Specialisation on degree (+6 years)	
				Technical education: 5 years of duration (9th, 10th, 11th, 12th, 13th);	Higher Technical Education and Training (ITS): 1 year; Theoretical starting age 19 years;	Tertiary-level Arts and Music Education (AFAM) Bachelor's degree 3 years of duration; First level graduate diploma (+1 year) Master's degree (+2 years) Second level graduate diploma (+2 years) Academic research diploma 3 years of duration	
	Compulsory education (6 – 16 years old)						Doctorate level (PhD) 6 years of duration
Adults education	Between primary school and ISCED 3 (12 years)						
Special needs education	No information for special needs education						

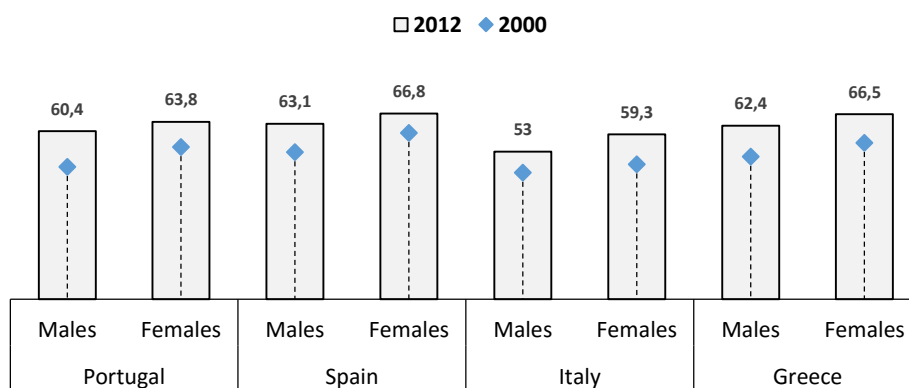
Greece							
	ISCED 0	ISCED 1	ISCED 2	ISCED 3	ISCED 4	ISCED 5	ISCED 6
Educational System	Theoretical start/ending age: between 4 and 5 years old	Theoretical start/ending age: between 6 and 11 years old	Theoretical start/ending age: between 12 and 15 years old	General upper secondary school (general lyceum): 3 years of duration (10 th , 11 th , 12 th); from 15 years old on.		Theoretical starting age: 18 years old	
	Pre-primary education (kindergartens): 2 years of duration.	Primary school: 6 years of duration (1st, 2nd, 3rd, 4th, 5th, 6th).	Lower secondary school (gymnasium): 3 years of duration (7th, 8th, 9th).	Vocational upper secondary school (EPAL): 3 years of duration (10th, 11th, 12th); from 15 years old on.	Vocational training school (EPAS): 2 years of duration (11th and 12th years)	Bachelor's level A. University and Technical university: the general bachelor degree has a duration of 4 years; Bachelor's in engineering, agricultural science, veterinary, dentistry & pharmacology have a duration of 5 years; Medicine 6 years; B. Technological educational Institute: bachelor's degree; 4 years of duration C. Non-university institution of higher professional education: is equivalent to bachelor's; it could have from 2 to 4 years of duration.	
					Theoretical starting age: between 18 yrs. old	Master's level: 2 years of duration. Year 2 gives transfer from master's to doctorate	
	Compulsory education (5 – 14/15 years old)				Grade-free post-secondary non-tertiary education: 2 yrs.		Doctorate level 3 years of duration
Adults education	Between primary school and lower secondary school (9 y.)						
Special needs education	Between pre-primary education and secondary school or post-secondary (16 years)						

Figure 2.2.1a Participation/ enrolment in education of students between primary (ISCED 1) and tertiary education (ISCED 6), as % of corresponding age population, by age group.



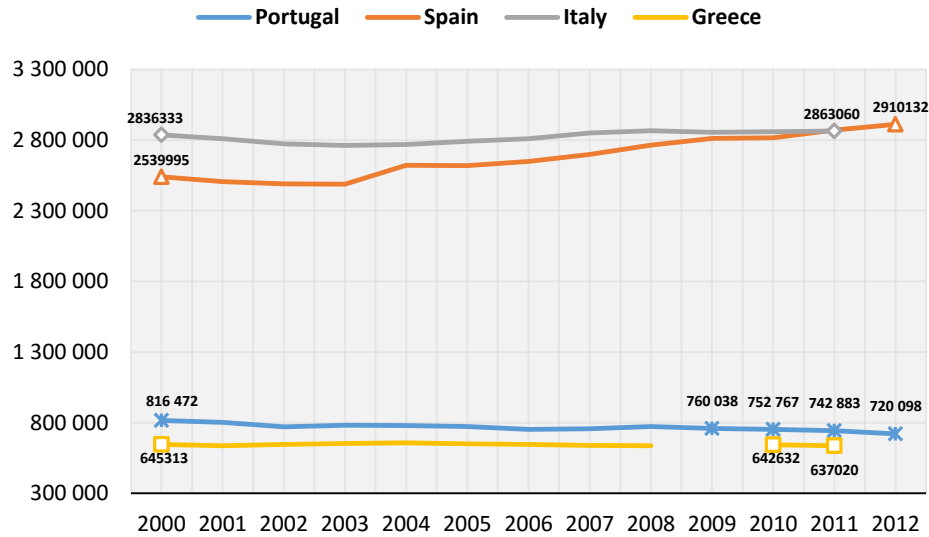
Source: Eurostat

Figure 2.2.2.b Participation/ enrolment in education of students between primary (ISCED 1) and tertiary education (ISCED 6), as % of corresponding age population, by sex.



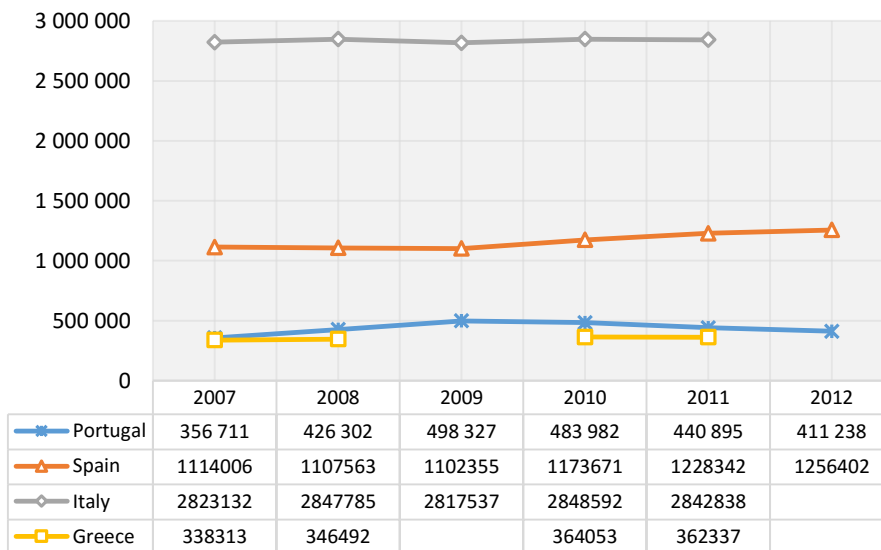
Source: Eurostat

Figure 2.2.2c. Participation/ enrolment in education of students in primary education (ISCED 1), as % of corresponding age population.



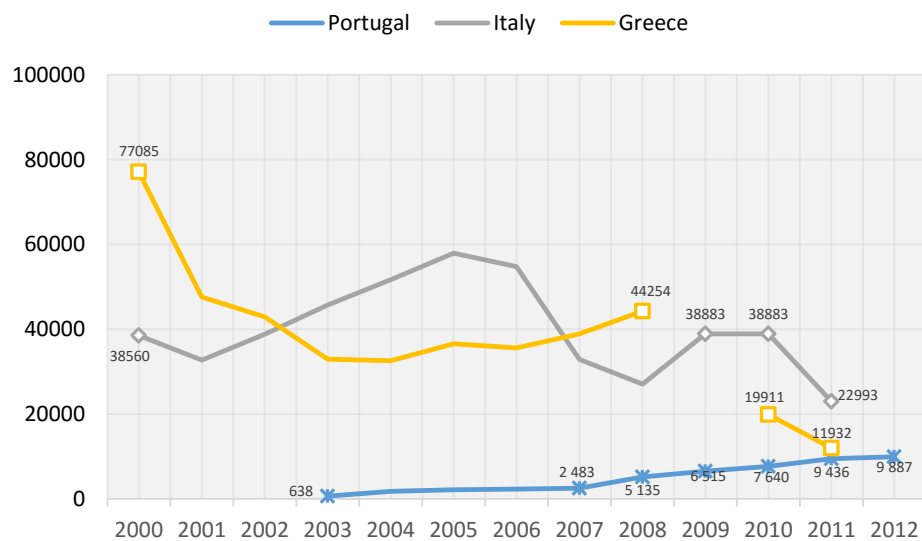
Source: Eurostat

Figure 2.2.2d. Participation/ enrolment in education of students in upper secondary (ISCED 3), as % of corresponding age population.



Source: Eurostat

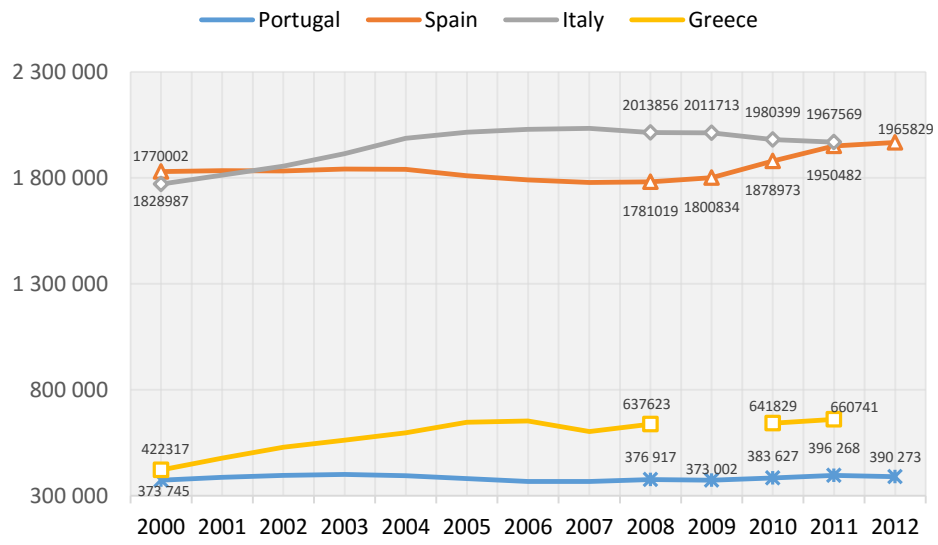
Figure 2.2.2e Participation/ enrolment in education of students in post-secondary education (ISCED 4), as % of corresponding age population.



Source: Eurostat.

Note: Data not available for Spain.

Figure 2.2.2f Participation/ enrolment in education of students in tertiary education (ISCED 5&6), as % of corresponding age population.



Source: Eurostat

Chapter 3. The “education quality” policies in Southern Europe and its impacts over teachers’ and students’ lives

In this chapter, we analyse the policies for the promotion of education quality, launched during the last decade, in Portugal, Spain, Italy and Greece, focusing particularly on the development of external mechanisms of monitorization and assessment, as well as on its impacts over teachers’ and students’ lives.

The chapter includes five sections. Firstly, we discuss how the management principles are being introduced in the educational policies, all over the world, during the last decades, as well as the criticism and resistance raised among the educational communities. Here, we will focus the importance of the assessment systems over schools, teachers and students. Secondly, some remarks on the comparison between education policies in Portugal, Spain, Italy and Greece are sketched. Then, the chapter analyse if (and how) quality management policies are reframing educational experiences in these four countries, focusing on students’ assessment programs (section 3.1), evaluation of teachers (section 3.2) and schools evaluation (section 3.3).

Quality, education management and education policies

If educational policies were dominated throughout the 20th century, all over the world, by concepts as universal access, development and equality, from the 80s on, there is a growing emphasis on concepts as quality and assessment. This doesn’t mean that the latter concern is necessarily opposed to the former, and the most enthusiastic actually sustain this is an essential path to achieve the former orientations, but one shall accept that there is a new approach.

Such approach, as it is happening also in other traditionally public sectors of the welfare systems as health or social security, is clearly influenced by the management framework, not only in the way efficiency is pursued in the use of the minimum resources to maximize de goal achievement, but also as education and the agents involved are conceived: education as a service to be provided; parents, teachers and principals as users, providers and managers. Although there is a discussion over in which measure the ultimate goals are specific for education and/or for the public sector, the tools used to reach them are

based on developments taking place in the management field. Therefore, quality – a vague concept that everybody agrees with – is systematically used as a way to legitimate standardized assessment programs over students’, teachers’ and schools’ performances, carried out by international organizations, national governments or external agencies, enabling the conversion of learning and teaching in tangible products (Sallis, 2005). Educational quality is then presented as a duty of educational professionals and institutions (the providers), and simultaneously as one of the main parents’ right (the users), as well as a key for economic growth and social development, although such relation is not always evident.

Although such changes were documented (and often criticized) by scholars in many countries, during the last decades, usually taken as part of a “global agenda” (Popkewitz, 1991; Carnoy and Rothen, 2002; Teodoro, 2008), dominated by capitalist and neoliberal forces, it is not evident that education policies are converging all over the world, and that their outcomes for students and teachers are homogeneous, even within Europe (Martins, 2012). As noted by Archer (1979) or Petitat (1982), education policies are the result of the interaction between multiple agents and forces, acting at different scales. Or, as Stephen Ball (1998) put it, there are common elements in contemporary international policies, but one shall also examine the translation and recontextualization processes, at national and local levels. Including in the core

Besides, it is particularly useful to analyse the recent developments taking place in educational assessment in Portugal, Spain, Italy and Greece, at least for three major reasons.

Firstly, avoiding moral judgments, this new agenda introduces a huge shift in the way education was socially constructed, in the Southern Europe. Rooted over the influence of religious and military institutions, educationalists gave sense to their work and position in the world, based on a humanist and illuminist ideology. Schools and teachers were those who were taking civilization and culture to the people. Obviously, the authoritarian regimes during the 20th century (in Portugal, Spain and Greece these regimes lasted until the 1970s; in Italy, it was particularly severe in the 1930s and 1940s but it was abolished after the II World War) developed strong systems of control, but they were based on political and moral concerns, and the expectations of many educationalists was that they

would be removed in a democratic era. Besides, the development of educational systems in these countries was considerably delayed, in comparison with the other European countries, and it occurred through a state-based, centralized and nationalist framework, highly influenced by the Church, especially in Spain (Enguita, 2001).

Secondly, the economic crisis from 2010 on was particularly severe in these countries, and its effects over education policies are not linear. On the one hand, the national states became more vulnerable to European Union and other powerful international organizations, so that pressures to accelerate “structural reforms”, in order to reduce costs and to improve efficiency in the public sector, to expand the markets and to attract external investment, were magnified. On the other hand, the European Union orientation to increase investment in education and to achieve ambitious goals of universal education was a landmark for the education development in these countries during the last decades, it was reinforced by the Lisbon Agenda, in 2001, and it was not abolished since the beginning of the economic crisis. Moreover, the huge cuts over education (as well as other sectors) and the permanent political instability generated by such austerity policies since 2010 has affected the (economic, social and political) viability of some reforms that were planned or already taking place.

And thirdly, one shall not take for sure that educational trends are homogenous in these four countries. Although Portugal, Spain, Italy and Greece are currently taken as similar in many international debates, especially at European level, this eludes the important differences between them. For instance: (a) in Portugal, Spain and Greece, authoritarian regimes ruled until the late 1970s and EU integration just occurred in the 1980s, but this is not the case in Italy, (b) the Catholic Church is traditionally powerful in Portugal, Spain and Italy, but in Greece the Orthodox Church is dominant; (c) Portugal and Greece were committed (and supervised) during the recent years by an international financial assistance program; (d) Italy and Spain are bigger countries where the public systems, including education, are partially organized by regional structures; (e) governmental instability during the last years was higher in Greece and Italy, than in Portugal and Spain; (f) and so on. One shall wonder if some of these factors have influenced the educational policies, especially on assessment measures.

Monitoring education in southern Europe

Quality-based educational policies were carried out in Portugal, Spain, Italy and Greece during the last decade. A common standpoint is that national assessment systems in the four countries were weak during the previous decades, characterized by a huge increase in the number of educational institutions and professionals. However, according to our data analysis, there are considerable differences concerning the intensity of such policies and also the programs carried out in each country to achieve “quality”. Though a European Qualifications Framework has been developed, only in higher education, after Bologna settlement, it is possible to observe a consistent process of convergence concerning the assessment of institutions and graduations, in the four countries. Still, such assessment system appears to be focused in so far on formal aspects of institutions, teachers and graduations, rather than over learning patterns and outcomes. In basic and secondary education the evolutions taking place are more diversified.

In Portugal, quality became a key concept in political agenda from the 90s, especially in relation to a strong criticism over teachers in the media. From 2005 on, national programs for assessment of schools, teachers and students were carried out, through very different methodologies and the relations between them are not evident. Although students’ scores in PISA tests have increased considerably during the last decade, such assessment systems were a huge focus of controversy. Especially, the assessment of teachers generated massive demonstrations in the streets and it was partially removed, not being clear their effects over the improvement of teachers’ pedagogical practices. Meanwhile, while schools evaluation system is often neglected, national exams over students in the end of each educational stage are used by the media to generate annual rankings of schools, contributing for competition between schools, pressure over teachers and stigmatization of those with lower scores. From 2011 on, under a right-wing government with a more conservative vision of education, national exams were reinforced, and they were criticized as a mean of pressure over teachers and children, back-to-basics orientation, exclusion of vulnerable groups and increase of retention rates.

The Spanish education has a regional autonomy within a centralized framework. It is a relatively decentralized system. Through the Ministry of Education, Culture and Sport (*Ministerio de Educación, Cultura y Deporte, MECD*), the central government designs

the legal framework regulating the principles, objectives, and organization of the different school levels, as well as a proportion of the contents and subjects studied. Ministries (or departments) of education from the 17 regions develop and manage their education systems based on these guidelines. Other bodies also shape education policy.

Italy, compared to other OECD countries, is characterized by underdevelopment in terms of monitoring and evaluation practices of the educational system. However, the demand of evaluation of the educational system in Italy increased over the last ten years (Fondazione Giovanni Agnelli, 2014). First, the disappointing results collected by OCDE PISA 2003 about Italian students compared to international data. Second, the increasing autonomy of schools that required a wider control from central authorities. Third, the Philosophy of the New Public Management. According by Brunetta Law (n. 15 / 2009) the work of all public administrations has to be evaluated according to efficiency criteria. Forth, the effects of Internet Culture: families require more information and data on the quality of schools in order to make the correct school choice.

The Greek education system has been monitored according to the principles of public management until today. The formal education system is wholly managed and controlled by the ministry of education. There is little autonomy given to schools and these only refer to extracurricular events and other such activities. The lack of autonomy at a large scale goes today hand in hand with evaluation perceived more as an instrument of control than of attempting to improve the education system. Changes related to evaluation and quality assurance were introduced in 2005 and 2007 and started being implemented at a large scale after the law 4009/2011.

3.1 Students' competences assessment

During the last decade, Portugal, Spain, Italy and Greece were involved in international inquiries of students' competences, and some of their results had a considerable impact over public awareness and governmental policies on education. Still, the results of these countries and the effects of the reports publishing were not always similar. Besides, influenced by these international studies, the national assessment of students'

competences was also reinforced in Portugal, Spain and Italy, but through distinct models and tools. In Greece, such evolution is not apparent.

In the Portuguese context, several institutions and international tests have played their part in through studies and recommendations, but the OCDE PISA program is clearly the most influential. It was from these international studies and models that the current external evaluation system was built in Portugal (Lemos, 2014). Briefly, the OCDE, the International Association for the Evaluation of Educational Achievement (IEA) and the European Commission (CE) have promoted international programs evaluating children's and youth's performance worldwide, in math's, sciences, reading and foreign languages. Since 1991, Portugal has participated in comparative studies on educational achievements⁵. These participations revealed a major influence in the development of OCDE's instruments for examining national policies worldwide, focusing in the organization of each educational system and recommending specific public policies. The main aim has been to construct, compile, consolidate and disseminate international comparable indicators, through what later became the IIEES, for further uses on governance mechanisms, standards and benchmarks, and into detail of prescribing behavior and to influence convergence processes between countries.

The results of 2009 and 2012 PISA studies indicated that the general school performance in Portugal was converging to the OCDE's average, particularly for mathematics and science – decreasing the differences in at least in 30% from 2000-2012, while for reading skills, in about 18%. In addition, there was a decreasing on the number of students with the lowest performance – of about 5% less in general, and 8% less in reading, while increasing the numbers of those with highest performance. Nevertheless, PISA studies have continuously emphasized that the Portuguese case still indicates a close relation between PISA performance and students' retention (though also slightly decreasing).

Meanwhile, national exams in the end of each educational stage (at 4th, 6th, 9th grade) was progressively implemented, as it was the case only in the end of secondary education (12th

⁵ (the International Assessment of Educational Progress (IAEP I and II); IIEES – International Indicators and Evaluation of Educational Systems; PISA – Program for International Students Assessment; TIMSS - Trends in International Mathematics and Science Study; PIRLS – Progress in International Reading Literacy Study; ESLC - European Survey on Language Competences; IECL; EAG - Education at a Glance, PIACC etc...)

grade), and their impacts in students' and schools' evaluation were also reinforced, during the last decade. A large criticism

In Spain, PISA has a strong influence in public debates on education. As it happens in Germany or USA, almost every regional government has its own PISA, by paying OECD the cost of increasing students sample. However, despite a 35 percent increase in funding since 2003, the national scores remain below OECD average. While 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.

The PISA reports have also concluded that 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 Spanish 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.

The last PISA report has been issued in 2012 and reported a worse performance of Italy compared with the average of OCDE countries. Nevertheless comparing this wave with the previous data collections, Italy shows some improvement: from 2006 to 2009 average scores increased and 2012 confirms this trend. However, a great territorial divide still features the educational performances of Italian students and national surveys, which confirm it. This difference is very significant if we consider performances in mathematics and in readings in some Italian region (Trentino, Friuli Venezia Giulia, Veneto, Lombardia) where students are among the best performing students in OECD area, compared to very poor performances in Southern regions.

Italy participates also to IEA surveys in the collection of PIRLS and TIMMS data. Despite this participation, limited efforts are dedicated to further analysis and reflections on

results. Not many studies have been developed based on this data and their dissemination usually occurs with a consistent delay compared to the time of collection. INVALSI (National Institution for the Evaluation of the Educational System) for the first time in 2011 published the national report in conjunction with the international one aiming to enhance the wider use of these surveys⁶. It reports also the main features of Italy in terms of student characteristics (especially familiar background) and learning skills, educational practices and schools structure. However, PISA, and especially IEA data, does not seem to be used in an appropriate manner when it comes to educational policies in Italy. First of all, they have often declared the willingness to use data collected by these international surveys for purposes that the same surveys do not consider feasible, as the evaluation of the single schools. But the most significant point is that Italian political representatives systematically ignore the results of these surveys to reform the scholastic system (Gentile e Rubino, 2011, p.197).

Since 1999, INVALSI is the Ministerial agency charged of three main tasks: evaluation of efficacy and efficiency of the national educational system; progressive improvement of the quality of the educational system in order to provide an equal distribution through the territory; Collection and diffusion of quantitative data on national school system and the results of students learning. More in details, INVALSI has been charged by the Ministry Directive n. 85 /2012 of: Periodic and Systematic (every 12 months) evaluations on students' knowledge and skills and on the whole educational offer; Studying the causes of drop-outs and early school leaving; Elaborating the written national tests to assess the general and specific students' learning at the end of the lower secondary school; providing models and guidelines to facilitate schools in the formulation of the "standard test" (the so called "Third test") at the end of the upper secondary school; Evaluating the performance of students terminating the upper secondary school according to international criteria in order to ensure the comparison with other countries. Providing support and technical assistance to school administrations, regions, provinces, territorial agencies, training agencies for improving independent practices of monitoring and evaluation; Education and training activities for teachers and principals; Research activities; Ensuring the Italian participation to European and International research

⁶ 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.

projects in the field of evaluation; Counselling and assisting schools for self-evaluation projects.

Since their introduction, INVALSI tests have been under discussion. Criticisms are moved towards the inspirational models, 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 the test and other issues that affect data validity and affordability. Nevertheless, these tests are the only evaluation tools currently existing in Italy, standardised and on an individual basis. It needs to be remembered that in the past in Italy there was total absence of evaluation practices, due to cultural and financial reasons. MIUR instead manages the National Registry of University Students providing open access to data on a basis of single academic unit.

Concerning student's performance at an international level by which the system could be indirectly evaluated, apart from the PISA study, Greece does not participate in other international assessments, such as TIMMS (Trends in International Mathematics and Science) that studies trends in competencies in mathematics and physics at the last year of secondary education, nor at PIRLS (Progress in International Reading Literacy Study) that documents trends in reading comprehension at fourth grade of primary education (more details, see at timmsandpirls.bc.edu). Although the results of PISA are rather controversial in public opinion and it is not evident its role to the education policies carried out by recent Greek governments, the students' scores in this program remains far below the OECD average, especially in Mathematics, but they slightly increased during the last decade (OECD, 2013).

Teachers in Italy enjoy a wide autonomy in students' evaluation, which includes the definition of the evaluation criteria, the decision of repeating one year and the elaboration of tracking/final exams. Since 2007/08, the final exam at the end of the 1st cycle of the education in Italy includes a set of tests elaborated directly by teachers (Italian language, two European foreign languages, mathematics, science, arts-technology and a multidisciplinary oral exam) and, only since 2008, in addition, a national written exam

(INVALSI test) composed by open and close questions in reading and mathematics is compulsory.

In Greece, 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 within the Ministry of Education: such is the case with the PISA results, in which Greek students do not perform so well; in such a case, there are no formal organization structures responsible to carry out a discussion, only the Ministry of Education could issue a report or plan a study into this.

Evaluation has been the subject of vehement debate. Some consider it a means to control education, to enforce conformity, to punish those who disagree with the decisions of the education authorities, or simply who are different from their department heads or school directors. In the words of an education policy expert: “Research in the European context has shown that quality assurance policies (strongly promoted by the EU) are associated with reduction of public funding due to the withdrawal from welfare states... It is therefore important that the social actors (academics, students etc.) resist the above policies through their active participation in decision making both in national and international contexts” (Prokou 2014a, expert interview, 2-12-14).

Briefly, the four countries have participated intensely in international tests assessing students’ competences, and such participation, especially in the PISA program, has an important impact over public debates and evaluation systems, although the linkage to broader educational policies is not always evident. Besides, the national scores in the four countries were near de OECD average in Spain, and below this average in the other countries, but they have been improved during the last decade, especially in Portugal and Italy, while in Spain such scores were stable (OECD, 2013). Therefore, some convergence is apparent, especially if one considers that most central and northern European countries has decreased PISA average scores during the last decade.

3.2 Teachers evaluation

The assessment of teachers' professional performances is one of the most controversial topics of political agenda in Portugal. In 2008 and 2009, the Socialist Party government planned a national program to the compulsory assessment of all teachers by school principals and coordinators, included in the existing system of public employees' annual assessment. However, it generated a huge opposition among educationalists, well-organized by teachers' unions and supported by all parties in opposition, so that this program was simplified (Abrantes, 2010). The former assessment system based on administrative data and self-evaluation was restored, and just those who are candidates to the highest classifications and to grade promotion has to apply to the complete process. Still, since grade promotion is blocked, due to austerity policies, few teachers apply to such evaluation. Besides, the right-wing coalition elected in 2011 was committed to their opposition to the teachers' assessment program, so in spite of a huge moral discourse on the need to restore rigour, discipline and accuracy in schools, their policies concerning teachers were focused on appliance of a national test of common knowledge. Once again, after a huge resistance of unions, the Ministry of Education decided that only young teachers (with no experience or less than 5-years of teaching experience) are obliged to apply to this exam and they have to be approved to be allowed to teach in public schools.

In Spain, the evaluation of teachers is made on a regular basis by school principals. Still, since they are at the same time teachers and eventually they will return to their former position as teachers, not specialized in this area, have little time to spend on it, and school teachers participate regularly in their election, few principals are committed to an effective assessment of their "colleagues" (Enguita, 2001). The inspectorate is only involved in evaluation of teachers under specific circumstances, such as career promotion (EACEA, 2013).

Italy is characterized by the absence of evaluation of teachers (Eurydice Italia, 2009; EACEA, 2013). The topic of education, training and recruitment of teachers in Italy has always been a delicate one. It became even more controversial since the abolition of the SSIS (High school for Teaching) in 2008. Until 2008 SSIS (since 1999) it was the only available pathway for future secondary teachers while a Degree in Primary Education (since 1998) was requested to become a primary teacher. This new system has been

characterized since its beginning by a high degree of precariousness, especially affecting SSIS that has suffered from the uncertainty of continuity at the end of each academic year (Luzzatto, 2011). Once abolished, this specialization school has not been substituted by another institution so that many future teachers have been for years in a limbo waiting for their qualification and working in very precarious conditions, even if fully qualified. In 2010, new guidelines for obtaining the qualification have been issued.

According to the European patterns, teachers' education is divided in general and professional component (Eurydice, 2013). In Italy, teachers at primary or pre-primary levels of education are trained under the concurrent model, which means that they acquire general and professional competencies right from the start of their tertiary education. Lower and upper secondary teacher instead are trained according to the consecutive model, so that they acquired their professional competencies at the end of their degree. While in most of the European countries, an upper secondary certificate is enough to access the teacher education, in Italy teacher students are required to take a specific examination decided by the national education authorities. So, Italian teachers in fact enter into the labour market through a competitive examination alongside with a candidate list. These lists, set at provincial level, include not only prospective teachers who have passed competitive examinations, but also those who obtained their qualified teacher status through sporadic one-off qualification procedures (specifically reserved for unqualified teachers with at least 360 days of teaching experience), or through attendance at SSIS (the former post-degree specialisation schools for teaching at secondary level) (Eurydice, 2013, p.47).

The employment authority varies according to the typology of contract: teachers with a permanent contract are employed by the Regional School Office, a branch of the Ministry of Education. Teachers with a fixed-term contract are recruited instead from a regional list and the contract is made directly with the school (Eurydice, 2013, p.49). In Italy, as in most of the European countries teachers have to pass through a probationary period that implies 180 days of valid service in 12 months. This period thus is fixed and valid for all ISCED levels. Despite the attempt to reform the educational track for teachers, a critical issue in Italy remains the lack of coherence between education pathways and recruitment practices. One other weakness point for the teacher's career is the scarce supply for training on-the-job.

In Greece, teachers - an integral part of the education system - are treated as a 'necessary evil': lowly paid, their work is not highly estimated by education authorities, and their opinion is not asked whenever education reforms are planned. They do keep a necessary degree of autonomy to carry out their work. Teachers' reaction to the planned evaluation was therefore massive and negative. Issues, such as recruitment and in-service training continue to be a matter of concern, for on the whole are evaluated as 'insufficient'. Until 2007, the Greek education system is monitored and managed according to the principles set by public management. After 2011, new laws plan different management structures, and introduce evaluation as an instrument for quality assurance, according to international standards. However, due to the past, uses of the instrument of teachers' evaluation, today it is still perceived as a means of control, enforcing conformity and punishing rather than as a means of improving effective quality education.

For the evaluation work, funds were made available, as well as for other administration structures that are new within higher education. In addition, evaluation does not include departments or universities, but it extends to evaluation of personnel that it has been planned, but partly implemented, with the exception of academic staff members, who are being every year evaluated by their students since 2011. The plan for evaluating public servants remains to be carried out, together with the administration personnel in schools and teachers of the other two educational levels.

In conclusion, the evaluation of teachers is a controversial topic in Southern European countries, and any of these four countries have a consolidated system to assess all teachers, in a regular basis. Although some policies were launched during the last decade, a strong resistance was apparent from teachers, and the austerity policies taking place made such policies hardly feasible. The erosion of teachers' working conditions and the absence of promotions and rewards, in a context of privatization policies, pave the stage for a common idea that a new program for the evaluation of teachers would be merely used to dismiss and to demote many teachers.

3.3 School evaluation

According to a recent Eurydice Report (EACEA, 2015), external school evaluation is carried out in most European countries, although a great diversity of models is in use. In Southern Europe, such heterogeneity is apparent. This report concludes that while in Portugal and Spain there are national systems of school evaluation, in Italy there is also a pilot project and in Greece (as for instance in Finland) there is no national system for the schools evaluation. Besides, the Portuguese system is considered the most complete one, among this group, since the external evaluation is developed by a team of inspectors and other experts in education, school teachers, pupils and community participate in the evaluation process, external evaluation is linked to the self-evaluation, the school board is consulted before the end of the evaluation report, and the each school external evaluation is publicly disseminated. For instance, in Spain, the external evaluation is carried out by the Inspectorate, but community members are not consulted and the evaluation reports are not public.

In parallel to the international evaluations, national Law n.º 31/2002 defines the non-high education evaluation system (pre-school, basic and secondary education) in Portugal, based on self-evaluation in all schools, and external evaluation – with multiple initiatives from private and public entities, not rarely related to the existing international evaluation assessments. After some experimental programs, the schools evaluation system was launched in 2005 and it was developed during the last decade by the General Inspection for Education (IGE), linked to the school autonomy policies (Coelho, Sarrico, & Rosa, 2008, Sarrico, 2014). It was influenced by school evaluation systems in other European countries, especially in Scotland, but it was also carried out in the context of the media annual publication of the “rankings of schools”, based on the average scores of students in national tests.

The corresponding advices and recommendations of CNE from 2006-2011 evaluation focused in autonomy and participation issues, and can be divided in three moments. Firstly, the Parecer n.º 5/2008 (of 13th June) underscored negative effects of school rankings but giving importance in continuing the schools’ evaluation model and the different responsibility levels within the system – local, regional and national, while coordinating auto-evaluation with the external one. Secondly, the CNE Parecer n.º 3/2010

(of 9th June), recommending the extension and deepening of the consultation mechanisms, namely reinforcing the municipalities and parents participation. Finally, the n.º 1/2011 CNE Recommendation (of 7th January), focusing on the three main aims of schools' external evaluations: the training of the school community; the regulation allowing elements that support schools' decisions; the participation of all elements in schools through a formative perspective that reinforces auto-evaluation. Last but not least, these recommendations raised the need to include private, cooperative and solidarity networks, in complement with external evaluation. In sum, focusing the attention on students as well as on the need to adapt the trajectories proposed by the system, they define these priorities in close relationship with the local community, thus, calling different agents for their responsibilities while reinforcing also the need for social certification, efficient management of the existing resources and of the regulation mechanisms producing relevant information.

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

Indeed, in Lemos (2014) view, schools' external evaluations may lead to two essential functions, retroactive information, meaning creating monitoring practices to adapt policies and the management of the pedagogic process, as well as social certifications, i.e., creating social trust in society. Lemos (2014) sustains that the current national evaluations have been the main changes of educational policies possible to be identified in the short term. As also expressed in Veloso, Abrantes & Craveiro (2011), Lemos also argues that current national examinations, being currently based on tests in the end of each cycle and national exams, give considerably more priority to the social impact of school certification, producing, thus, external and irrecoverable information. This is so because, the author continuous, such external evaluation does not allow to act upon the learning process of the students under evaluation (because it does not allow retroactive actions) and, consequently, being of no use to work on the need for school's equity. In

this sense, these are mechanisms to promote social trust because certificating knowledge but not allowing to convert and transform the outcomes – exams do not improve education quality as they do not allow to act upon the conditions that promote their outcomes. And even if social trust may in some cases improve, this occurs at the cost of quality and equity mechanisms and needs. Thus, national evaluations have become, in this sense, less efficient in terms of resources management, and its consequences in terms of society transformations on equity. Differently, international evaluations have allowed mechanisms to improve the quality of the system, in terms of resources efficiency and access. Indeed, many of the improvement of equity conditions for education access have resulted from OECD pressures and the common international indicators (IIEES, through their studies and recommendations, though experiencing significant internal resistances).

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

In Italy, despite the Law n. 59 /1997 which ruled the school autonomy, schools have little autonomy over matters such as hiring teachers, dismissing teachers, formulating the school budget and deciding its allocation within the school⁷, comparing to other OECD countries. According to the Eurydice Report (2009), if we consider the autonomy of schools in accessing and utilizing public funding, Italian schools report a full autonomy concerning the purchasing of ICT technologies and in the operating expenses, but a total

⁷ 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.

lack of autonomy concerning properties purchasing. On the contrary, Italian schools benefit from a wide autonomy in accessing and utilizing private funding, that can be allocated to many functions such as acquiring goods, hiring teaching staff for extra-curricular activities. Instead, schools benefit from a full autonomy in defining the optional curriculum, even if teachers are not alone in this decision-making process but they are expected to work in team with the rest of the teaching staff and to follow local and regional guidelines. Schools are instead fully autonomous in terms of educational methods and schoolbooks choice.

Together with the raising of the school autonomy in Europe, the need for accountability has increased as well. Nevertheless, accountability practices in Italy are still very rare and backward, leaving the country at the margins of this tendency towards external evaluation systems. Thus, schools in Italy are not compelled to account for their own work in front of external actors, even if they are strongly fostered in promoting internal evaluation.

In Greece, the internal evaluation of every department is followed by an external organization. The relevant committee of the external evaluation is comprised by academics from universities abroad, who understand the Greek language. All the relevant reports are published on the internet page of the institution (see www.hqaa.gr). The criticism addressed to such a concentrated system is manifold. It is worth noting that the law of 1985, which was considered a landmark for introducing democratic structures of governance in schools, permits various civil society and professional organisations (e.g. farmers', workers', middle business' etc.) to write reports or recommendations addressing them to the education authorities. This seemingly democratic measure, means according to some authors that actually no one has the responsibility to do so (see Kantzara 2001: ch. 3).

A significant part of running an education system is to have statistical information. Availability of statistical data has been improved considerably *after 2012*; part of it is due to the measures issued conforming to the 'Memorandum of Understanding' agreement with the troika which promotes 'transparency' in the public sector. Still statistics are not up to date on a number of subjects, and most notably on education.

It was thought that one of the main mechanisms to combat corruption and facilitate public control over finances and other aspects has been to make public every decision made by

public authorities; for this purpose there is a site on the internet, called '*diaygeia*' (transparency). This measure has already bared some fruits as very often one can read articles that judge public spending, but this is another issue and we put aside for the moment.

Final remarks

In this chapter, we sketched the major changes in the education assessment system in Portugal, Spain, Italy and Greece, during the last decade. Our main idea is that, in spite of significant divergences between countries, there was in all of them a reinforcement of the management systems of monitorization and assessment, based on a restrict concept of quality and hardly able to generate an effective improvement of quality of teachers' and students' work. As a compensation for huge cuts in public education budgets, such mechanisms has generated an intensification and standardization of teachers' and students' work, focused on a limited set of skills and only assessed in the short-term.

Still, our analysis does not confirm the homogeneity thesis. Actually, assessment systems carried out in these countries are clearly distinct and although international pressures and trends were important in their development, they are following different models.

Besides, especially in Greece, but in some measure in the other countries too, the austerity policies blocked the economic and political conditions to settle consistent and constructive assessment programs, not only because such they require a considerable investment, but also because in a such a context they are not able to reward and to support school agents, but they are conceived as a tool to stress and to dismiss them.

Chapter 4. Equity and education: public policies and their results in Southern Europe

The term “equity” cuts with the previous dimensions of “equality”, “meritocracy” and social inequalities “dominance”. As an alternative, “equity” discusses on schools and education redistributive capacity, and the sense of justice that should be active on the assessment of each individual’s capabilities. (Enguita, 2013) More complex, equity does not nullify the effects of equal opportunities (equal access to goods and services) but discuss and problematizes the processes and mechanisms that schools and education must have in order to promote equality on scholar results and amongst those who do not achieve positive results within an egalitarian matrix. For Enguita, both concepts are determinant in schools and education’s roles nowadays, and society’s perspective on social justice and on the economic structure in modern societies. (ibidem, 2013)

According to Derouet (2009, 2010), equity was more recently promoted in the political discourse, since the legitimacy of schools democratization and the equal opportunities within a period of welfare states development, during the eighties and nineties, and progression, were started to be questionable. Despite the positive expectations around the “comprehensive models” of educational systems, or using education for social and economic progression, the levels of social inequalities were still very high in some countries and schools and education is still function as a reproductive instrument.

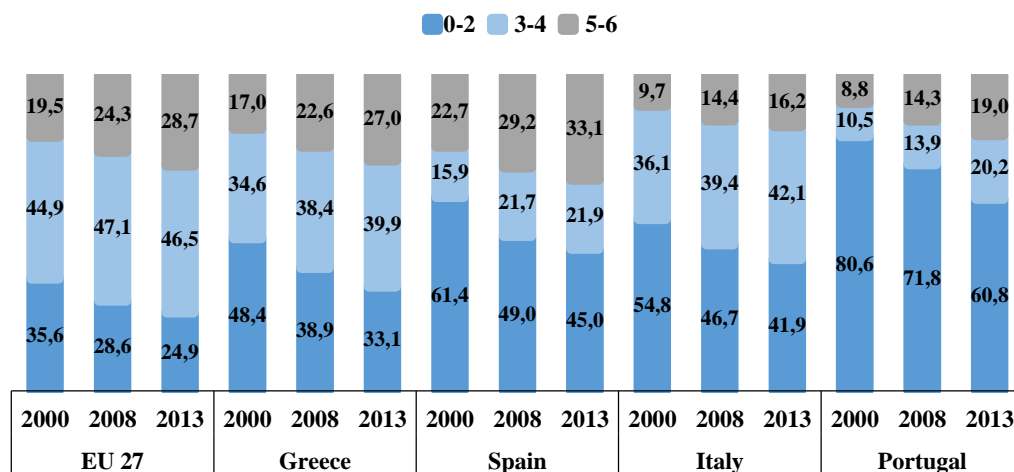
Lisbon agenda in 2001, boosted a "transnational educational agenda" (Cortêsão, Stoer, 2001) supported by benchmarking, in order to achieve all European national educational systems into a similar path of development. This new referential system aimed for the "equality" at national context but further within a context of world competitiveness. This corresponds to another period of educational policy, where the State instead of being an promoter agent of "equalities", assumes a managerial character in demanding for results. In place of a separated and delimited education, life-long learning became the main agenda, replacing the notions of abstract learnings for competences. (Derouet, 2010). Therefore, equity was largely promoted as a mean to guaranty the educational results, the economic development and also as a response to social inequalities. Policies in education started to reflect the importance of equity seen in programmes toward the scholar success

and access, among every pupil despite their social and ethnic origins, or gender; and the development of inclusive social and educational agendas.

In the context of this research we define “equity” as the effective opportunities, opposed to formal equal educational opportunities. This implies focusing on dimensions of inclusion and fairness of the educational system, i.e., population characteristics and socioeconomic contexts, such as family and cultural background, or disability - as factors that promote or hinder equal opportunities to the access and participation in education and school results. At an internal level (students pathways and achievements) and at an external level (social effects or outcomes from education such as labor market structure, levels of employability, social participation and cohesion, levels of criminality) (Lemos, Valter 2014; Sebastião, João, 2009, 2008) ; Capucha, Luís, 2010).

The educational systems of Southern European countries - Portugal, Spain, Italy and Greece – hasn’t yet totally achieved compulsory education, keeping limited levels of attainment of secondary and higher education among students and general population (by specific levels of educational failure and high retention rates) as a key characteristic, particularly in Portugal and Spain. Finally, a qualification structure of the active population with persistent lower educational levels when compared with the other European countries. The population aged 25-64 years holds: only the primary and / or basic completed, in 2013, 45% of the Spanish population; 41.9% of the Italian population; 33.1% of the Greek population and a staggering 60.8% of the Portuguese population, being the European average 24.9%, for the same year (Figure 4.1)

Figure 4.1 Evolution of educational attainment (%), in EU27, Greece, Spain, Italy and Portugal, between 2000-2013.



Source: Eurostat

Note: 0-2 (basic education); 3-4 (lower and upper secondary); 5-6 (tertiary education).

Thus, concerning equity issues, we can identify at least two processes, in Southern Europe. First, a significative process convergence of some educational indicators, showing a great proximity to European standards and results - for example, the considerable decline of the rate of Early School Leaving, and the progressive increase in schooling – altogether with the boost from European Union activities and agendas, on long-life learning development and adults education, or on vocational training. Second, an unsolved and persistent problem of qualifications and poorly educational outcomes, combined with problems in accessing the labor market.

The late schooling processes, explained by historical, political and social background specificities in Southern Europe, are one of the most preeminent factors clarifying the southern European backwardness:

- 1) The southern European's dictatorships (Portugal, 1926- 1974; Spain 1939-1975; Italy 1922-1943; Greece 1967 - 1974), with subsequent late democratization processes in society and school democratization, like those occurred in Portugal and Spain.
- 2) Labor market specificities, such as the remaining shares of lowest levels of economic productivity, and the development of specific sectors during the XX century (like the construction sector in Spain; the third sector in Portugal);
- 3) Growth of poverty and social inequalities.
- 4) Persistent precariousness in labor market (with high levels of unemployment and prevalent distinction well integrated individuals (general males, white) against situations of temporary work and bottommost salaries (the youngest, females, migrants).
- 5) The recent demographic retraction, combined with higher levels of population longevity, deepened the schism between qualification and social structures. While those within the working-age category show low qualifications and are pressuring the social system; the youngest are entering the educational system and achieving the highest levels of educational attainment.

On the other hand, considering the convergence and positive results achieved, we must highlight two order of reasons: international influence within the boosting of educational policies and certain educational sectors (such as Adults Education; Vocational; Early School) and, mainly, national efforts which were determinant to the results and to the implementation of educational measures, in these last decades. Policy-making, priorities and policy-choice, remains as the main factors to explain and subtract differences among the four southern countries, as further it will be analyzed.

In general terms, and since the mass schooling process endorsed after the II World war, inequalities in education were considered mostly within the relation between social relations and the educational systems. This leads to question how social identities can affect the chances of access, admission, durability and success in educational paths (Cesareo, 1972). On one hand, the educational system was seen as the major central problem i.e. as a reproductive mechanism of social inequalities (Bourdieu and Passeron, 1970; Bernstein,1975). On the other hand, and considering the economic growth and

social mobility, other factors became more explanatory, such as family dynamics and cultural background (cultural capital, Bourdieu).

Alongside with these perspectives, there are some important findings when we consider the relations between inequalities, southern educational systems and the current crisis:

- 1- Both external and internal factors, related to schools and social background, are still of major importance in southern European societies to explain the levels of educational inequalities;
- 2- Educational inequalities results from dynamics observed within the national educational systems and their relations with external factors. These external factors, corresponds mainly to family background, social class, social reproduction, and regional inequalities (seen in Portugal; the strong territorialisation in Italy; Spain´s regions and the autonomous governance, reflected in different educational policies) along with the internal scholar factors, meaning the school´s characteristics (for instance, private, public), the social background, school´s population, school´s staff. The combination between all these factors has shown to be the determinant to individuals´ academic careers.
- 3- Persistent duality: Selectivity versus democratization.

Although during the 20th century Europe several European countries almost reached the aim of full youth population schooling, educational inequalities endure. However, and considering the ongoing crisis, equality and equity are still far from being stressed, as all four countries in analyses share the same problems due to selectivity, mostly promoted by some educational political choices and crisis effects – cuts on education expenditure, for instance. Moreover, we tend to conclude that the levels of recovering from structural problems and achieve a better performance from educational system in promoting social mobility⁸, have not, though, been enough to diminish the social effect of the inequality at the educational level. This means, for instance, to reflect on the impacts of recent policies on “earlier tracking” (Portugal and Spain); the expansion of exams as a form of evaluation and selection (Portugal, Spain); the different scholar results among specific groups within the scholar population (Italy, Portugal); or the highest rates of school failure (Portugal and Spain).

⁸ Evidences also show that education and qualification are still the main ways for achieving better jobs and then better positions in social structure.

- 4- The impact of educational policy. Most of all what had become clear, is that the dominant political context, or the “ideology”, constitutes one key-factor. Particularly when linked to the strategies to face the crisis effects, namely the “cuts” and the designed political priorities.
- 5- Differences registered when analyzing data and policies, underline different priorities and results in education between southern countries and within countries.

In general, southern European education policies are structured on main assumptions related to the relevance of education (to 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. Nevertheless the recovery based on the positive results, after the crisis we observed the implementation of restrictions in specific educational domains.

This framing leads us to our hypothesis: In which sense can we think of Southern European Educational Systems selective character? Is crisis an explanatory variable to selectivity increase? Or is it due to structural deficits which contributes to increase social inequalities in education and therefore in society?

Next we will analyze and describe three areas related with education and equity, in the four southern countries. We will try to underline the regularities and the differences between countries and understand the levels of equity within the policies implemented and the crisis impacts in these same areas. In (1) “Participation and Access”, we will discuss the tracking and selectivity present in educational systems, the access to the pre-primary and the adult education and Special Education; (2) “Success, performances and fragilities in Southern Europe”, analyses the “population attainment” using three indicators that resumes southern population qualifications, and the performance of educational systems by analyzing the levels of retention, early school leaving and PISA’s results, as well as the strategies implemented by the countries to promote levels of success and equity in scholar results; finally (3) “Dynamics on expenditure and funding” analyses indicators on scholar aid, public and private levels of expenditure and funding.

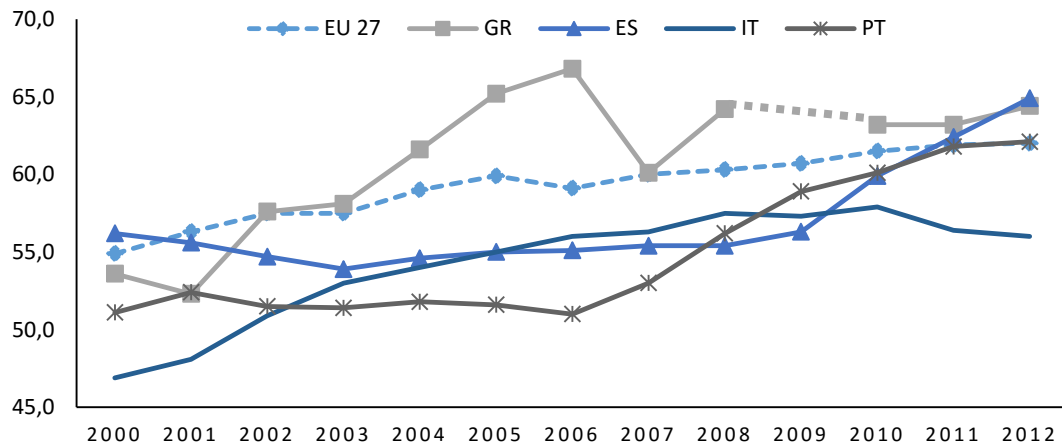
4.1 Education: participation and access

Tracking and selectivity

The positive evolution on participation rates and educational access is common to all four countries in analysis, despite the differences registered at their attainment levels. Several factors have contributed to the development and convergence to European standards. Enlarging compulsory school enrolment and attainment, promoting programs for scholar success, rising school aid for families and students, among others. The 4 Southern educational systems have gone through several reforms and processes in order to widen the access and participation in all levels of education. Also, they opened school access for everyone who would want to participate in education or needed specific support programmes. This is the case of Adults Education and Special Education, but also of the redefinition of the meaning of education and training, of the expansion of school careers, and the transitions between levels of schooling.

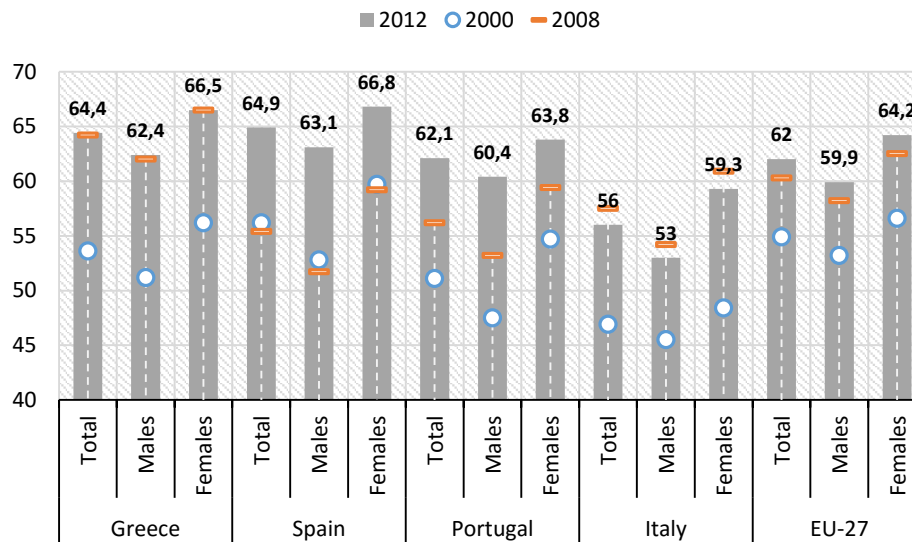
The evolution of participation rates in different school levels underlines the universal access of pupils in compulsory education (basic level, low secondary), present in all southern European countries educational legal framework. However, the participation rates of upper secondary are lower than 100%, despite of the principle of “right and duty of education or training for all” introduced in 2003 in Italy, and despite the 12 years of compulsory school in Portugal since 2009. Both Greece and Spain maintain a compulsory school of 10 years (lower secondary complete).

Figure 4.2 Participation/enrolment in education, of population between 15-24 years old, in EU-27, Greece, Spain, Italy and Portugal (2000-2012)



Source: Eurostat

Figure 4.2.1 Participation/enrolment in education, of population between 15-24 years old, by sex, in EU-27, Greece, Spain, Italy and Portugal (2000-2012)



Source: Eurostat

As we shown in figure 4.2 both Greece and Portugal have increased 11% in population participation, even if Greece retains an higher rate in 2012 (Greece – 64,4%; Portugal – 62,1%), having Spain the highest rate, for the same year (64,9%) and Italy, with a less expressive percentage (56,%) showing a decreased. One trend is common in all countries: woman are more represented in every case (Figure 4.2.1); and, apart from Italy – southern European countries have higher rates when compared with the European’ average (62%). These data indicates the convergence of these countries educational realities.

The compulsory school is a key-factor because it is linked to positive results and reveals other phenomena, particularly in the cases of Portugal and Italy, although for different reasons. First, Portugal the only country presenting 12 years of mandatory schooling. Implemented in 2009 by the center left government - against the will of the main opposition party at the time (right-wing) - this measure enabled the rise of the access and attainment

of the secondary level (within the adult's options) and implied programs for the rehabilitation of school's infrastructure as well as technological modernization.

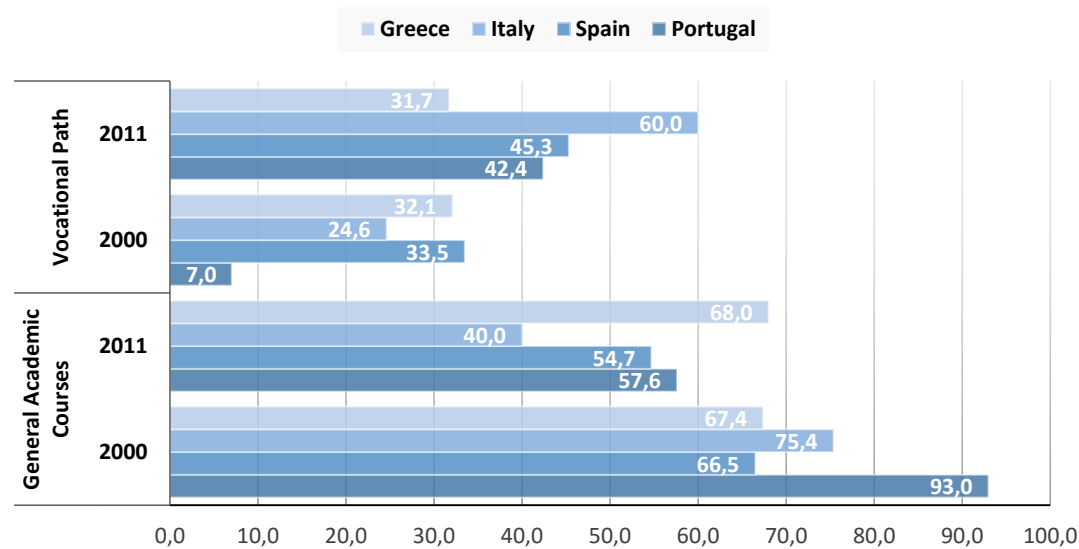
Second, compulsory school has contributed to improve the participation and attainment of students during the compulsory school period. This has been a topic in the political agenda in Italy in last decades, demonstrating that different political parties had different educational priorities. Some instability can be understood by the extension or ending of the compulsory years of schooling. The last extension was established in 2006, to 10 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, exceptionally, in a four year vocational training course (Cedefop, 2012). According to the Italian law, everyone has the right/duty to pursue education and/or training in national education for at least 12 years, or in the "IeFP system", Vocational System (Istruzione e Formazione Professionale, quoted in Maddalena Colombo, Italian Report).

"Tracking and selectivity" are related to two factors. First, considering the vocational system and the age/level where students can choose this path. Second, the access to tertiary or the factors that contribute to a compromised access. Selectivity is present when, for instance, we report that vocational and technological paths are promoting forms of selectivity in countries such as Italy, Portugal or Greece – major presence of some ethnical groups, or social groups, in some courses (Italy and Portugal); or differences in scholar results considering social background, type of school (Italy) or type of course (different results among students within regular academic path versus students in the technological branch, in Greece).

These forms of selectivity, or "hidden selection" (Italian Report) are also at the centre of the difficulties in accessing to tertiary system. In all four countries, the phenomenon is the same. Only a part of the secondary scholar population reaches the tertiary system, most of them arriving from regular, academic paths.

In secondary enrolment rates, vocational paths are an alternative to regular academic courses.

Figure 4.3 Participation/ Enrolment in education on Upper Secondary - General Courses and Vocational path, as % of all students at ISCED level 3



Source: Eurostat

In general terms, figure 4.2 shows an important transformation within the educational and schooling pattern in southern European countries. Vocational areas broke with a system based on almost exclusive unique pathway, allowing a more balance training and diversification of educational options.

Apart from Greece, Southern European countries present a considerable increase of vocational path students, especially Portugal, which increased 35.4p.p. (figure 4.3).

This evolution shows the progressive weight of the vocational areas in these countries, which has been a matter receiving particular attention in policy making domain, since the Lisbon Strategy 2001. In particular, since 2004, Portugal invested in policies addressed to the vocational, seen as a measure to decrease the “early school leaving” phenomena, to attain compulsory school, to reduce scholar dropout, or to give a clear response to

students with specific needs (e.g. students experiencing situations of social exclusion). On the other hand, the early tracking – recently implemented in Portugal,⁹– is also seen as an option whose structure and functioning promote a higher selectivity, especially when related with the access to tertiary, or the scholar success.

In Greece, vocational and technical courses represent the scholar pathways with “lower grades”, for “lower status students” (“less able”). Italy also reported different population composition, even-tough its major problem of inequality is detected among schools (type of school, localization) and less within schools and school’s options.

Portugal, until recent educational measures (started in 2011), was a southern European exception due to its compulsory school of 12 years, vocational areas were presented within the mandatory period, and were initiated at the upper secondary (mainly organized with a “comprehensive model”). This means that vocational education and training cycles last for 1 to 6 years, begins at 15 years old and it is 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), a transition implying tracking though with some degree of permeability. In general, the existing options, allows to complete compulsory education and to access tertiary education. The recent Vocational Courses are still seen as an experimental project, although with considerable number of schools involved and 24500 students enrolled since 2013.

Italy also has a particular situation, since the two last years of compulsory can be completed on both general pathways, or in a dual system of vocational options. Like Portugal, also the majority of its VET options allows to access the tertiary options. Exception to the “vocational and training education” options that gives access to a certification on “Higher Technical education and training” (level 4) but not to tertiary certification.

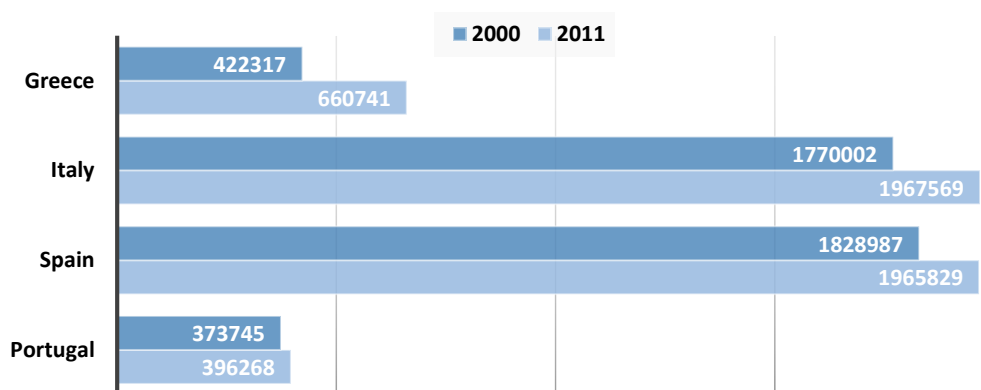
In both Spain and Greece, vocational options are to be attended at upper secondary and are not included in compulsory schooling. Spain has two types of vocational training.

⁹ At age 13, by the introduction of the Vocational Courses in Basic education (ISCED 2), or in Spain with the recent educational legislation targeting the age of 15 years (the New organic law for the improvement of educational quality (LOMC).

Middle Grade Training cycles, which requires an “ESO” degree (compulsory education) diploma, and Superior Training Cycles for those who detain a Baccalaureate diploma. Those who complete a Superior Training Cycle may then pursue to certain university degrees. In Greece both tracks, general and vocational, 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. Grade free means that 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 cannot be ranked according to a specific level of education. Vocational schools (EPAS) lead to further vocational training and also to ‘grade-free post-secondary non-tertiary education.

Considering the access to the tertiary education as a priority, all systems in analysis shows levels of “permeability” between these two educational paths, allowing students from VET courses to move on to tertiary education. Numbers of students attending tertiary options, between the years of 2000 and 2011, also grown in all countries (Figure 4.4):

Figure 4.4 Number of student (total), between 15 and >40 years old, that enrolled in tertiary system (ISCED 5 and 6) (2000-2011)



Source: Eurostat

Formal process of selectivity, at this level, occurs mainly at the end of the upper secondary with the exams. Nevertheless, mandatory exams are also forms of expressing selectivity in other levels of schooling. They produced a teaching / learning strategies, primarily provided or guide according to the results and grades, rather than promote meaningful and structural learning. Portugal, in recent years and during the last govern, extended exams to all educational levels, even though arguing that exams at the end of the primary education do not constitute a selective form of evaluation but a form of assessment considering the current curricular goals and students' knowledge, and a way to make students families. Despite this argument, teachers and schools refers that these exams promote selection among schools by promoting ranking between them, and among students, once results are afterwards within their final certification. In Spain exams also were extended within their last government, as a "selective" measure, expressing concerning in a possible promotion of less equity; in Italy exams occurs at the end of the low secondary and then at upper secondary, and Greece only at the end of upper secondary to pursuing to tertiary system. Further we will analyze grade retentions which are also of most importance in this case.

In conclusion, Greece is the country with less selective moments until the upper secondary, although it has other indicators of selection processes, like the differences on scholar results. The grades from lower secondary cycle are a standard by which enrolment is decided: lower grades usually mean that the student shall enroll in a vocational lyceum, while higher grades usually denote enrolment in a general lyceum. But we also can conclude, by the percentages expressed on the vocational/general participation indicator above mentioned, that general courses and academic tracks are overvalued. This can also compromise equity principles (even if Greece has policies trying to reverse this tendency, such as the "free grade" on vocational and training post-secondary, meaning equal access to this path no matter what previous type of certification)

When we cross the results with the political orientation, the periods where right-wing parties were at the government, education passed through great reforms and measures in all countries promoting a more selective pass, by largely reinforcing the vocational streams in some cases, by expanding national exams and by fomenting earlier tracking and duality in the systems. Promoting compulsory school and enlarging the options within

the educational system, are both seen policies from left-wing parties, or right-wing parties.

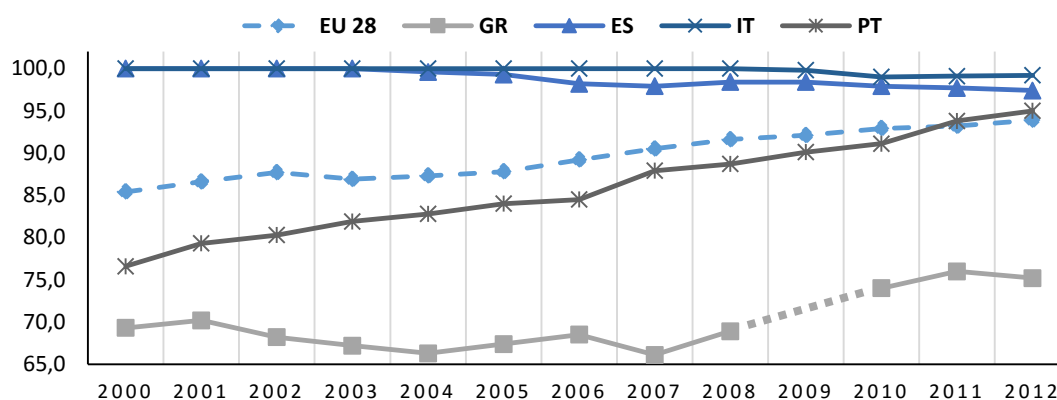
4.2 Access Pre-Schooling/ Pre-Primary

Southern Europe invested in pre-schooling enlargement access and participation based in the general conception that early school attendance prevents future school failure and drop-out. This was, in fact, one of the sectors that had received greater attention from European education guidelines. In general terms, it corresponds to a positive educational indicator, in which southern Europe steps in great proximity with other European countries' rates.

Pre-schooling is not mandatory, but both Portugal and Greece had determined universal access for those aged 5 years at pre-primary (and, in case of Greece, by mandatory access). Despite the good results, Italy reports that no legal framework is defined, as well as it occurs in Spain.

The number of enrolments in pre-school has continuously increased from 2000 to 2012: in Portugal, 47.666 more pupils (from 228.459 to 276.125), though with a slight decrease in 2012 to 272.547; in Spain, 784765 (from 1135114 to 1919879); in Italy, more 113806 pupils (from 1574034 to 1687840 at 2011); and finally in Greece, more 44088.

Figure 4.5 Pre-school enrolment, between 2000 – 2012



Source: Eurostat

In the period from 2000 to 2012, in most EU countries the participation pre-schooling rate (children between 4-years-old and the starting age of compulsory education) increased, and the same trend is observed among Southern European countries (figure 4.5) Both 4 and 5 year old children are the ones with most evident participation in all four countries (see in annex). Exception on Greece, in 2012, every other country surpass European average of 93.9% (Portugal, 95%; Spain, 97.4%; Italy 99.2%). Greece has less participation, and considering the same rate for age 4 only, was about 55% at 2012 (in Portugal -91,6%; Spain 97%; Italy – 98,7%). Nevertheless, in Greece 95.6% of the total population of pupils aged 5 in 2012, because of the mandatory enrolment, attends in pre-primary level (an increase of almost 14% from 2000) (figure 4.5).

Pre-school services are provided by public and private institutions, or, in some cases, in some cases, by community / social institutions or private schools with a contract with the state. association This is the case of Portugal, often scarce in the public system, particularly for 3 to 4 year olds, allocation follows different types of guidelines. Public and private institutions work as a complementary network of pre-primary education - 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 (private and cooperative education institutions) and non-profit education institutions (private solidarity institutions). (Portuguese Report)

In Portugal, 144.918 (national data) of the total of pupils in pre-schooling (272.547) in 2012, attended public institutions. The percentage of pupils enrolled in pre-primary public schools has changed in Italy, from 72.5% in 2001 to 71% (national data) in 2011: despite the trend is quite uniform, in 2006 and 2007 a relevant decrease of pupils occurred in public schools (-4%). Spain has 65% (Education at Glance data) of pupils attending public schools within this cycle; and in Greece, the majority of students age 5 attend to public institutions, being the private sector almost residual.

In brief, the evolution of pre-primary education in Southern Europe, seems to be independent from the crisis effects, or the family's budgetary limitations, or even political tendencies followed by governments, probably more associated to social and family needs and expectations.

4.3 Adults education

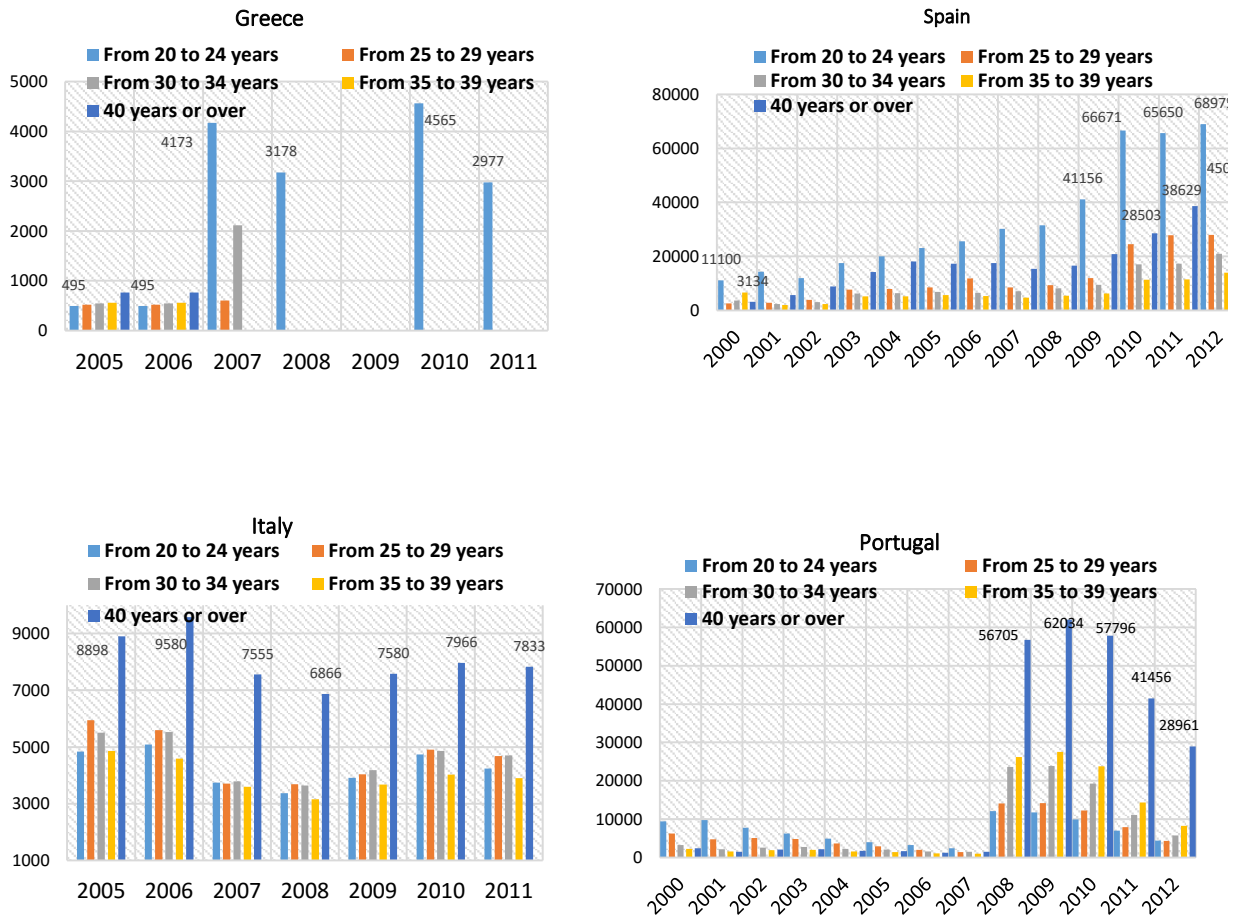
In terms of the relation between policies and equity, adult's education represents one revealing indicator. On one hand, differences can be observed among southern countries, both in results and political investments. On the other hand, in some countries, internal differences can be detected through a diachronic perspective from 2000 to 2012, alongside with specific moments: Lisbon Strategy; Crisis; national policies and related measures.

The advent of the Lisbon Strategy in 2001 boosted the attention to “Life Long Learning” and “Adults Education” throughout the European countries. The main objective was to create and stimulate knowledge-based economies, with both economic and educational development. Despite the criticism grown around the promotion of “human capital” theories and the prevalence of economic interests, Southern Europe benefited from the legal European framework to develop national actions of Life Long Learning and adult's education, and to reduce part of the structural problem of qualifications.

This educational area shows different results and dynamics of national policies, in the four countries under analysis. We can find significant differences and regularities within countries, and it can be argued that domestic policies are the reason why external influences seem to be overwhelmed in terms of policy priorities and investment, in this particular education dimension.

In general terms, the access of adult population to education has increased in all countries. Between 2005 and 2011, however, numbers and dimensions are different, having Portugal and Spain the highest increase.

Figure 4.6 Number of students in Lower Secondary with more than 20 years old, in Greece, Spain, Italy and Portugal, between 2002 and 2012.

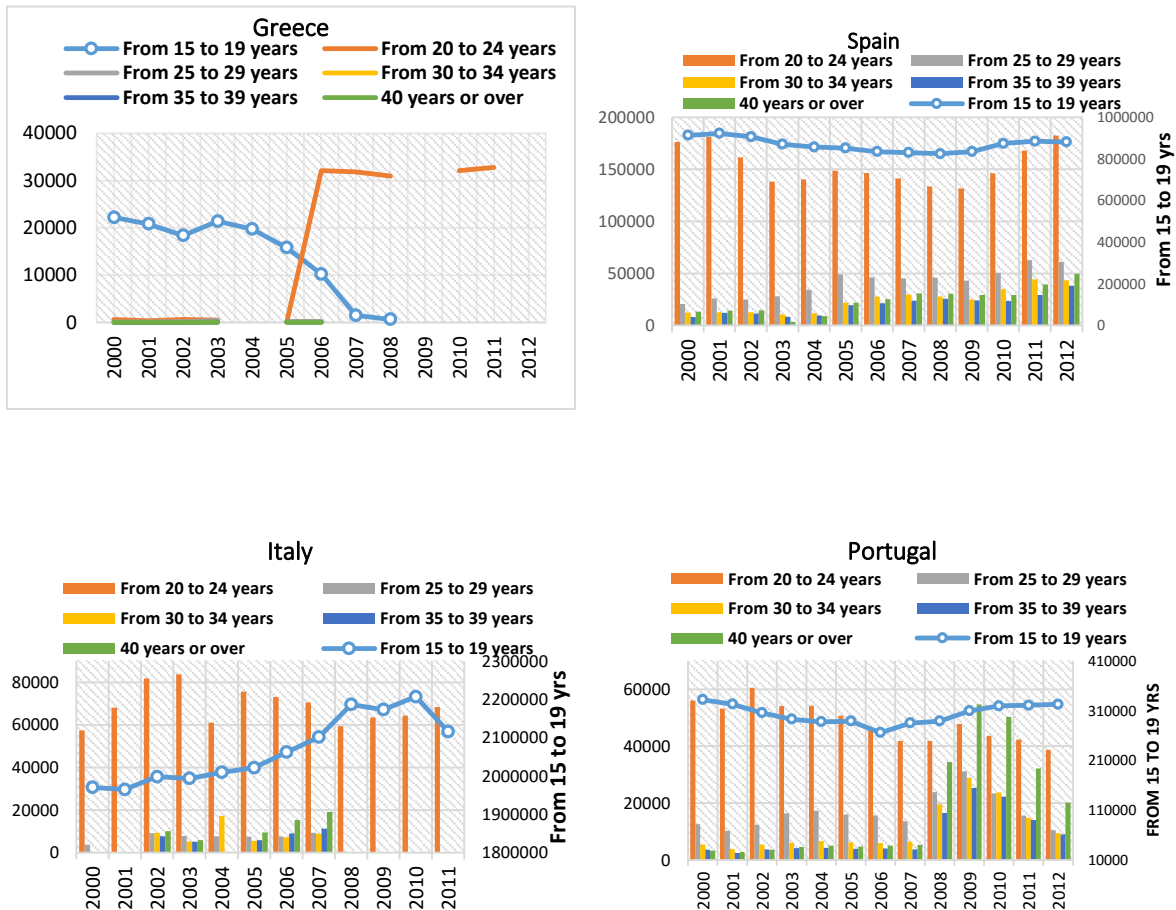


Source: Eurostat

Considering the age range in Lower Secondary, between 2000 and 2012 (figure 6.6): Portugal had more 26558 students with 40 years or over (from 2403 to 28961); this was in fact, the adult category where the numbers of participation have grown more.) This increase was mainly seen after 2007, when the new program for Adults “Novas Oportunidades” – (New Opportunities) was released by the left-wing government at the time. In 2011, Adults (all age categories from 20 years ahead) represented 11,8% of all population participating in Lower Secondary. After 2011, the “restructuring” of Adults options leaded by the current government at the time, meant ending the NO program and resulted on halving drastically the adults with 40 years old or over participating, so in 2011, the number were for about 40 000 adults, and in 2012 for about 29 000 (figure 4.6).

The same trend is seen when considering the participation in Upper Secondary, in Portugal (figure 4.7): other categories had grown considerable (20-24; 30-34 and 35-39), but once again the major increased was observed in the age category 40 years and plus – from 3226 in 2000 to 20140 in 2012. And as with the lower secondary, between 2011 and 2012 less 12. 000 students were registered in Upper Secondary options. In 2011, the total of adults students represented 27% of all Upper Secondary population, and in 2011, 21,3%.

Figure 6.7 Number of students in Upper Secondary, in Greece, Spain, Italy and Portugal, between 2002 and 2012.



Source: Eurostat

In Spain, after the “New Organic Legislation” for education in 2006 – in which among other issues, Adults Education and Life Long Learning were considered of political priorities – the numbers had increased in all adults age categories. The most represented ones are: for the lower secondary, 20-24 years with more 57.8875 adult students (from 11.100 at 2000 to 68975 in 2012); and like Portugal, the 40 years and over, with an increase of 41 916 students (3134 to 45.05) (figure 4.6). As for the Upper Secondary, the

most represented category is 25 -29 years old, increasing in 40 145 (from 20820 to 60965); and the 40 years and over, increasing in 36.416 (from 13.241 to 49.657) (figure 4.7). In terms of policies, Spain follows mainly the ESO (secondary School mandatory) principle which determines the universal access to education, developing amongst others, the “long distance learning”, based in online courses. Spain reports that despite being based on the general legislation, Life Long Learning activities are also legislated and implemented at regional level.

Italy and Greece have in common weakest policies for adults and less adults involved in education.

Italy’s Adults Education is reported internationally and nationally (Cedefop, Isfol¹⁰, 2012) as a “critical point”. Despite its recovering in the general population attainment (especially concerning the secondary level) a strongest policy in this domain is considered to be necessary, once the participation rates in Life Long Learning and education are still considerable low. Making an allowance for the Lower Secondary, between the years 2000 and 2011, less participation is seen in general in every age category (from 20 years old until 40 years old and over and with exceptions on the ages 30-34 with a slight increase). The most prominent decline is observed in age 40 years and over, with less 17 382 (initial number: 25.215) adults participating in this cycle. At 2011, adults represented only 3,2% of all lower secondary population. (figure 4.6) Italy’s data for upper secondary are uncomplete in several years, although remain information had shown a similar trend. Adult Education courses are provided mainly by “Centers for Adult Education” (CPIA), recently renewed¹¹, and based in lower and upper secondary state schools (figure 4.7).

One of main factors reported to explain the unsuccessful numbers of adults involved in education, is due to the structured of these courses and Centers, which have providing an excessive “scholar” base education, lacking in a more experimental and practical subjects (empirical learning).

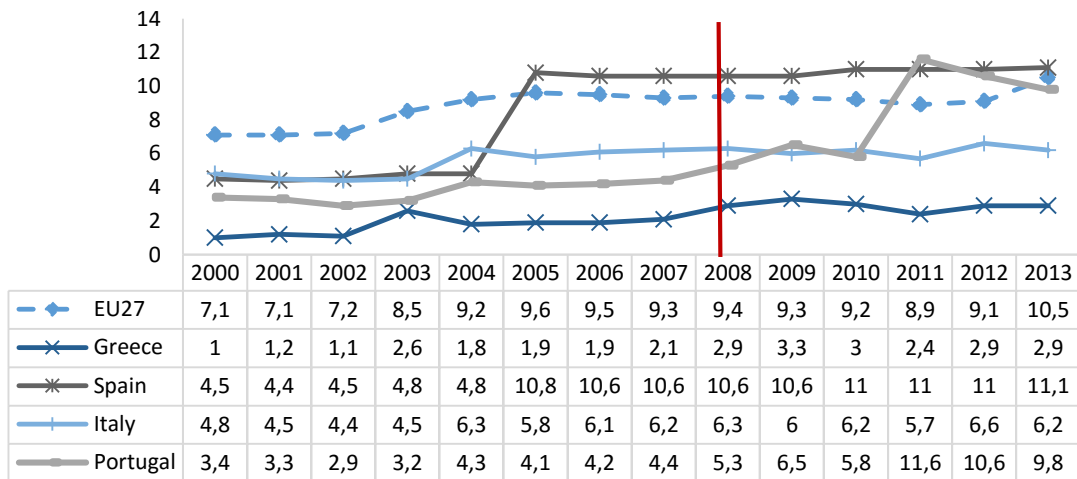
¹⁰ – Italian Institute for the Development of the Professional Education of Workers. It is a national research agency acting under the supervision of the Ministry of Work and Social Policies.

¹¹ – 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.

Data of participation of adults in lower and secondary cycles in Greece are not sufficient to sustain an objective analysis (figure 4.6). Nevertheless, other indicators (participation rates in last 4 weeks in education and training, policies and measures concerning this sector) are demonstrative that Adults Education represents a weakest point in this country. (figure 4.8). Despite becoming the country with a qualification structure nearest the European standards in last years, Life-long Learning and adults education initiatives clearly were not a political priority in last years, which stands as a way to compromise equity among those who have abandoned the educational system (even if this country presents the lower ESL rate of Southern countries).

Adult's education, at compulsory education level, is provided by 'Schools of Second Chance' since 1997, following a "scholar bases" model. There are 58 of these schools all over Greece, not covering all areas of the country and situated only in cities. The Greek 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 this is an important matter to the national educational agenda (see also Prokou, 2014b). However the attempts have rather stopped due to budget cuts in education. In Greek case, crisis represents the main key factor explaining the interruption of future investments in this sector and the general lack of demand.

Figure 4.8 Participation rate in education and training (last 4 weeks), for population with 25-64 years old (2000-2013).



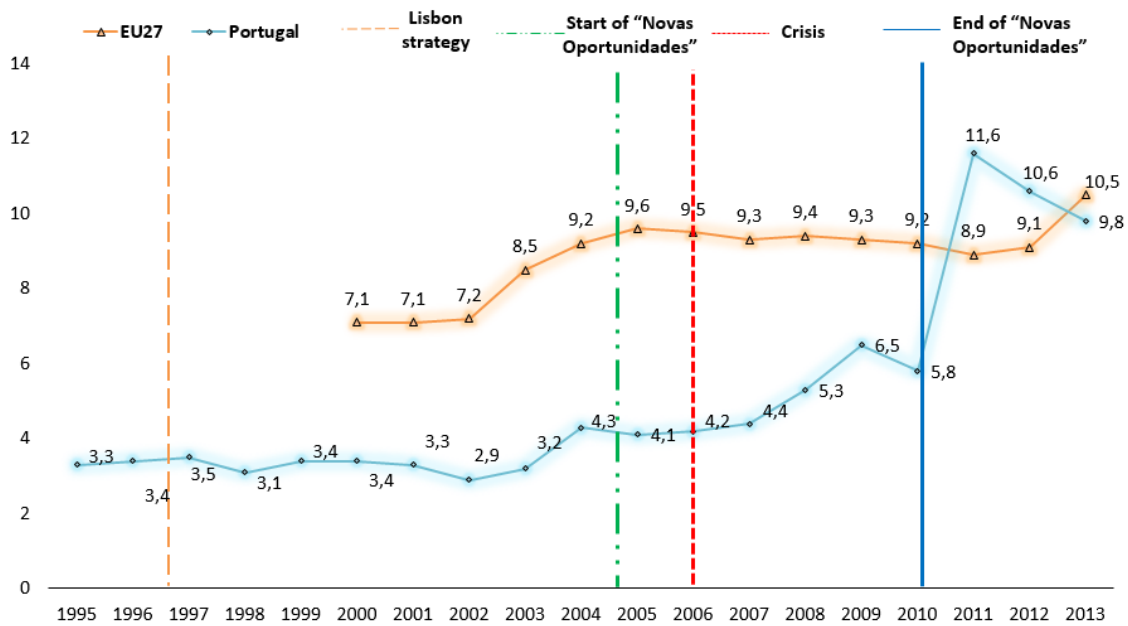
Source: Eurostat

The participation rates (25-64 years) follows the tendencies above mentioned: Spain and Portugal leading in results (10,8 % at 2012 and 9,8 in 2013), on contrary Italy and Greece with poorest percentages (at 2013, 6,2% and 2,9% respectively) (figure 6.8).

However, it is important to underline two findings: 1- in Greece, if we considered other age categories, like 25-34 years old, rates increase to highest levels (7,4% at 2013). In fact, this age category is one of the most represented also in other southern countries for the same year: Portugal 9.9 %; Italy 13.4%) which is clearly pronounce that Adults education has a major role in youngest recovering from earliest school leaving. 2- Portugal as the only country with a more evident decline in results, demonstrating that policy choices in 2011, reversed the initial trend and once again put the Adult Education outside of national educational priorities. As it was said before, ending the main national program for Adults education and decreasing in lifelong learning initiatives, had severe consequences.

The case of Portugal: “New Opportunities” Program

Figure 4.9 Participation rate of adults in education and training (25-64 years), 2000-2013.



Source: Eurostat

Adult further education measure - “Novas Oportunidades”: adaptation or rupture?

2000	2005	2010	2014
<ul style="list-style-type: none"> • Lisbon Strategy • EFA courses (adult education and training) • CRVCC (Recognition, Validation and Certification of Skills) • ANQ (National Agency for Qualification) • Catálogo Nacional das Qualificações (National Catalogue of Qualifications) 	<ul style="list-style-type: none"> • Reduction of Recurrent education • Proliferation network • Modular training • “Novas Oportunidades” initiative (2007) <p>2007- 2008: 43. 641 adults in Primary School 47.177 adults in Secondary School</p> <p>2008-2009: 159.149 adults in Primary School 169.190 adults in Secondary School</p>	<ul style="list-style-type: none"> • Shift in political context • Decreased network: minus 28 EFA promoters in Primary School; minus 20 in Secondary School; minus 221 CNO and RVCC; • ANQEP (National Agency for Qualification and Vocational Education) • End of “Novas Oportunidades” (2011) <p>2010-2011: 104.793 adults in Primary School 96.274 adults in Secondary School</p> <p>2012-2013: 25.325 adults in Primary School 36.615 adults in Secondary School</p>	<p>Stagnation</p>

Table 4.1 Adults Policies and results between 2000-2013

The significant increase in adult enrollment resulted in the Portuguese case from a program designed to deal with a massive process of qualification. If some countries reported crisis and unemployment, as a factor and opportunity for adult’s participation (Spain) or, on contrary, as a main factor explaining the suspension of political measures (Greece). In the Portuguese case, due to the nature of this program (mainly financed by community European funds), other variables are more consistent explaining the declines observed. One of the most distinctive characteristics is due to its educational principal and foundation: combining both processes of learning and teaching from late community based initiatives, using the adults experience as an educational outcome for itself, with other “formal” ways of education. The Validation and Recognition of Competences (RVCC) was the model with more numeric expression and positive results. (table 4.1 and table 4.2)

Adults Education stands as one of the most problematic indicators analyzed in this country, in terms of participation in education and equity analysis. Equity is compromised

here at least at two levels: Firstly, because there were recent severe ‘cuts’ in this domain, with the closure of an entire program dedicated to solve the qualification deficit of people over 20 years old, and beginning on the oldest generations. (NO) . This compromised adults education and training offers in a long term, leaving thousands of people with no valid educational options; Secondly, direct consequences on the labour market by restricting the supply of skilled labour and limiting the job offer to low-skilled and low-paid jobs.

Adults qualification and education had a clear development between 2000 and 2011, increasing participating rates and level of certification. 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) (figure 4.9). More evident, if we analyze the number of students who had completed the secondary level by educational modality, we clearly see that the options concerning the program ‘NO’ had a drastic decline: in 2008/2009, 44.916 adults had completed secondary grades within the RVCC⁵ system, while in 2013 there 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, with the intensification of some old educational tools for adults (e.g. ‘recurrent education’), as the only offer available. Today recurrent education has increased again in 2013 and for the first time since 2006. (Portugal Report) (table 4.1 and table 4.2).

Table 4.2 Numbers certified population at Basic Education (ISCED 1 and 2) and at secondary level (ISCED 3), in Portugal (2004-2013).

		2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013
Recurrent	ISCED 1&2	2091	1597	11143	889	142	142	74	36	2
	ISCED 3	12162	13139	14590	8231	5802	5031	4665	3779	4303
Education and Training courses	ISCED 1&2				10295	8359	13634	12087	8729	4294
	ISCED 3				376	11763	16269	18517	15130	8932
Validation of non-formal and informal learning	ISCED 1&2					75935	70147	41342	24494	7841
	ISCED 3					44916	47173	18997	11451	10357

Source: CNE Estado de Educação (2013)

Another important factor is that NO program and adults education options had also an important role for younger generation's education, particularly for those aged 25-34 who had trouble completing 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 completed only the basic education c. In 2012, OCDE recommended in the "Ongoing Growth" report, that Portugal should expand NO program, being of major importance for adults and younger generations, but this was not taken into consideration.

Southern Countries had followed two main orientations in Adults Education:

- 1- Community-based initiatives, focusing mainly in the aspect of "qualification" - Portugal with the development of the New Opportunities Initiative.
- 2- "Scholar model", favoring the traditional component of "teaching and learning", or the "recurrent" learning - Spain fortified "compulsory secondary education", developing, among others, learning at distance; Italy with "permanent territorial centers", offering a formal education, recently replaced by "provincial centers for Adult Education"; Greece – essentially using the "second chance schools".

The crisis has brought considerable changes in political practice and results: Portugal presents a shift in the political orientation and educational priorities, cutting with the previous guiding principles of convergence and growth, in matter of the qualification of adults. The end of New Opportunities is an example, with hard consequences showed by the decrease in the number of individuals in qualification processes.

NO was an unparalleled program in the European context, which boosted a mass process of adult qualification and followed a guidance of a community-based component. Between 2006 and July 2011, 1,568,490 adults (about 28% of the active population) had enrolled in NO, of which 424,739 had been certified.

In Spain the ongoing crisis (and rising unemployment) boosted adult education, with registration of the increase of individuals involved in education, more clearly within the

ESO (Compulsory Secondary education - formal component supply) at "Adult education centers" and training activities.

Greece and Italy have worse outcomes in adult education, investing in non-formal components, however maintaining a qualification structure also with better results. The indicators show that adult education had grown in a more slowed pace, indicating some incipency in adult education and lifelong learning policies. The orientation of adult essentially follows the paradigm of "second chance" and traditional teaching component

4.4 School's diversity - Special Education

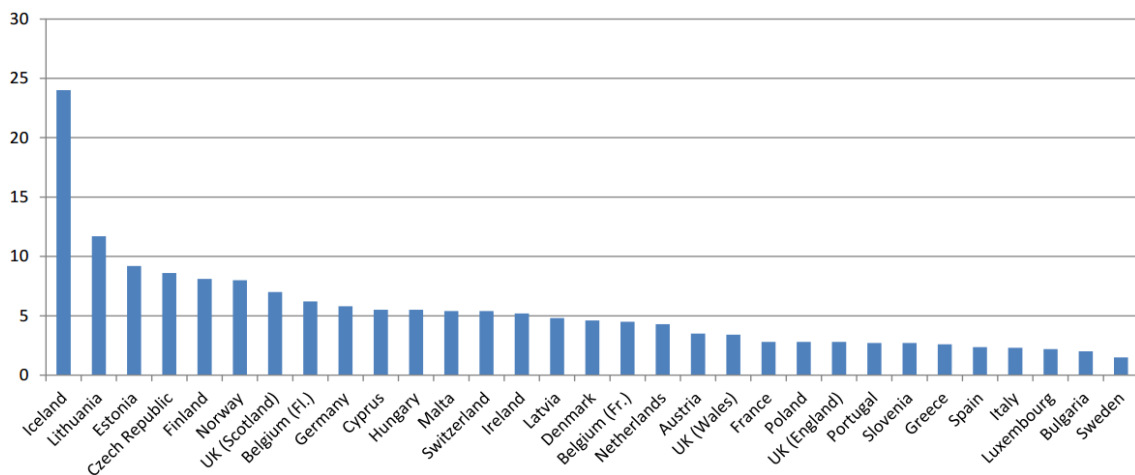
One second critical dimension which can enlighten the relevance of equity in the overall activity of an educational system and in public policies, is the attention provided by children with SEN.

Relevant differences can be found 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 (Nesse, 2012). Data shows considerable variation in the percentage of the school population in compulsory education, identified as having special educational needs (SEN), ranging from 1.5% in Sweden to 24% in Iceland. Southern Countries follow a similar trend on rates of pupils signalized with SED within compulsory school: at 2010, Portugal had 2.7%, Greece 2,6%, Spain 2,4% and Italy 2,3%.(NESS, 2012) (figure 4.10).

In general terms, countries have been developing policies within equity principals and considerations promoted by European agencies in this sector. In 2000 the EU presented the "Charter of Fundamental Rights", where the social integration of disabled people was considered as one important assignment for every state member, followed by the creation, by the European Commission of a legal framework at 2003, requiring member states to implement anti-discrimination legislation. More recently "Disable Strategy 2010-2020" identifies the education and training as one major field to promote inclusion and integration. Nevertheless, as it is reported by NESS, analyzing SEN models reveals to be a difficult task due to the range of classification of disabilities considered as target in educational systems: for instance, Greece has a model where SEN comprehends both

disable pupils and disadvantaged pupils, and Spain a generic category of disability, plus disadvantaged, plus gifted students.

Figure 4.10 Data from NESSE (2012) regarding pupils identified as having SEN as a percentage of the total school population in selected European countries.

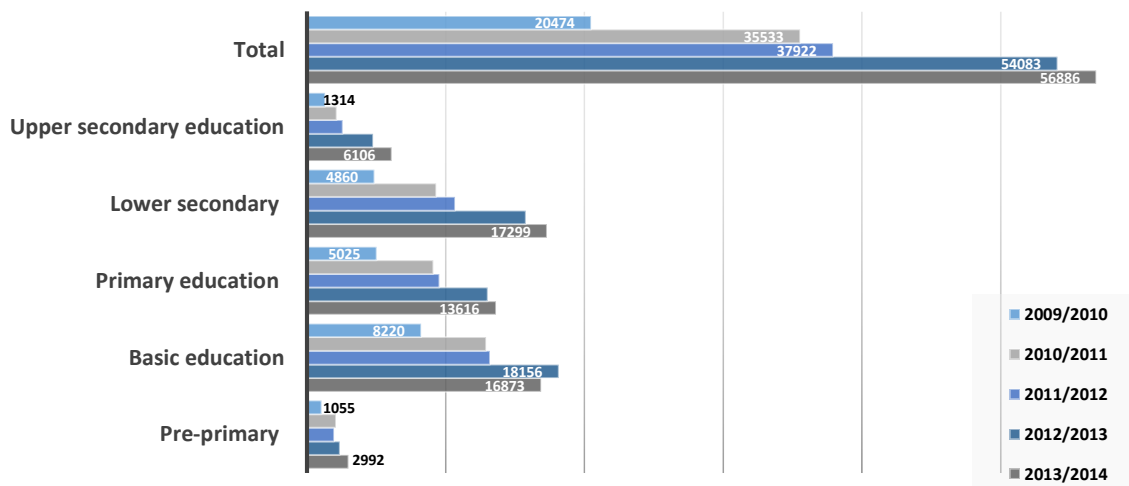


Source: The graph was taken from the report Support for children with special educational needs (SEN), April 2013 (Figure 1, p.11).

Note: EADSNE Country Data 2010 (cited in NESSE, 2012)

Portugal

Figure 6.11 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).

In Portugal, one key element was the development of the “Inclusive Education”¹² agenda, between 2006 and 2010. Inclusion was the major aim with the real integration of children with Special educational needs in regular schools and classes. As a consequence of the implementation of the integration agenda, the total number of students signalized with special needs increased in all cycles, from 54.083 in 2012/2013 to 56.886 in 2013/2014. 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 return to the earlier institutionalization of these segments- integrating these children in specific unites that are

¹² – “(...) inclusive education as the process of increasing participation and decreasing exclusion from the culture, curriculum and community of mainstream schools” (NESSA report, 2012.)

not covered by Portuguese school's network - again being strengthened in political discourse. For those children staying in regular schools, national exams must be performed by children in SEN with the same level of difficulty and time frame as regular children. Several parents' associations of children with disability have been contesting these measures and the lack of human resources allocate in this sector

At the same time, 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 (figure 4.11). Finally, the decrease of the specialized unities integrated in schools – CRI (Centers for Inclusion Resources) situated in school clusters – 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) (table 4.3).

Table 4.3 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, 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

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) (table 4.4). 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 (Figure 4.12). The lack of specialized

teachers in schools and the cut in social support to families obliged a significant number of children to stay at home frequently with the support of family members (grandparents mainly)

Table 4.4 Applicants and holders (No.) of financial allowances for special education, by NUTS 2 regions, between 2009 and 2014

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

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

Spain

National data from Spain informs that 2,1% of the total of students at 2012/2013 were signalized with SED, thus 0,9% at Pre-school; 2,2% at primary; 2,4% at secondary; and 7,8% in vocational options (table 4.5).

Table 4.5 Students with SEN (%) in Spain, between 2012-2013

	Total	Kindergarten	Basic	Secondary (ESO)	Post-secondary (PCPI)	Bachelor (Bachillerato)	Professional qualification (FP)
<i>Public centres</i>	2,3	1,1	2,6	2,6	6,9	0,3	0,5
<i>Privately run schools funded by the state</i>	2,2	0,6	1,6	2,2	11,2	0,4	0,7
<i>Private schools</i>	0,3	0,2	0,3	0,3	3,0	0,3	0,2
<i>Men</i>	2,7	1,1	2,9	3,0	7,5	0,4	0,6
<i>Women</i>	1,5	0,6	1,5	1,8	8,6	0,2	0,5
<i>Total</i>	2,1	0,9	2,2	2,4	7,8	0,3	0,5

Note: **ESO** - Educación Secundaria Obligatoria (School Leaving Certificate); **PCPI** - Programa de Cualificación Profesional Inicial (Initial professional qualification); **FP** - Formación profesional.

Spanish 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.

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.

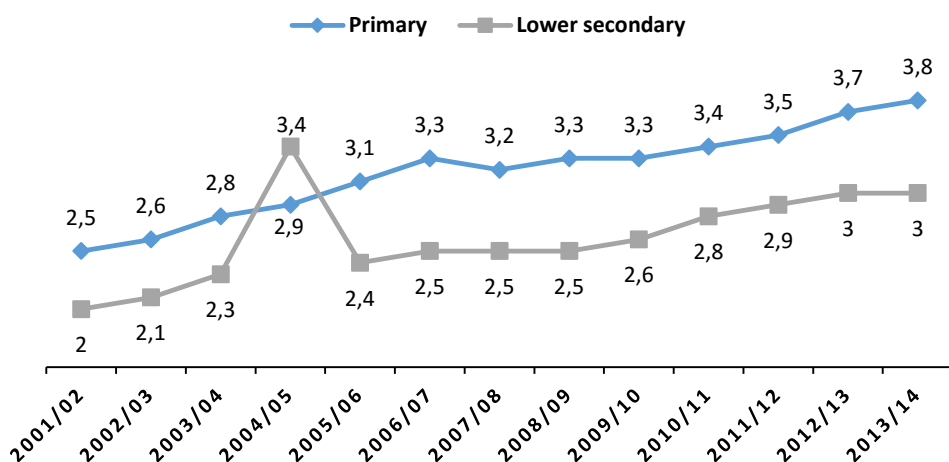
For pupils who have serious developmental disorders, who cannot attend school, hospitalized, or those who must be absent from school for long or repetitive periods of time for medical reasons, the autonomous communities have formulated and implemented various organizational alternatives, among which 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. (Spain Report)

Italy

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 education, passing from 2 to 3% in primary school, from 2.5 to 3.7% in lower secondary school (Figure 4.11) In upper secondary school, we can observe a variation from 0.9% (2001/02) to 2% (2012/13).

Figure 4.11 Percentage of students with disability per level and scholastic year (2001/02-2013/14)



Source: Istat-Miur

In primary education learning disability and difficulty have come out recently. The majority of pupils with learning difficulties or behavioural 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 specialized 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 corps 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 extra schooling activities is limited (only half of students have access: Istat, 2014a).

As a principle of equity in educational policies (since Law 517 / 1977), 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.

Greece

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.¹³

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.

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. (Greek report)

To sum up, we can identify different models of Special Education and Inclusion. In statistical terms, every country increased the number of pupils and participation rates.

Portugal created an Agenda for “inclusion” in regular schools. Italy committed with “disability certification” and “integration in class rooms”, as well as several other recent legal measures for enlargement of the participation. Spain implemented curricular adaption and specific “educational project”, where autonomous regions play the organizational role. Italy also invested in a more “inclusive” agenda in education.

Portugal presents a shift in the “educational paradigm”. The austerity context and financial retraction does not constitute the main explanatory factor of the late measures in education. Results both in Adults Education and Special Education are showing that equity and levels of inclusion are compromised in Portuguese schools by a mix of educational bias and elitist conceptions of school.

¹³ – (www.statistics.gr/portal/page/portal/ESYE/PAGE-themes?p_param=A1404).

4.5 Success, performances and fragilities in Southern Europe

In the analysis of the equity levels in educational systems we've considered the issues at access to education of specific groups. We will now examine how access and success are produced across the systems under analysis.

Educational Attainment

We will consider three main indicators to analyze and resume Southern Europe attainments levels: population with upper secondary, population with tertiary education and the percentage of population below upper secondary.

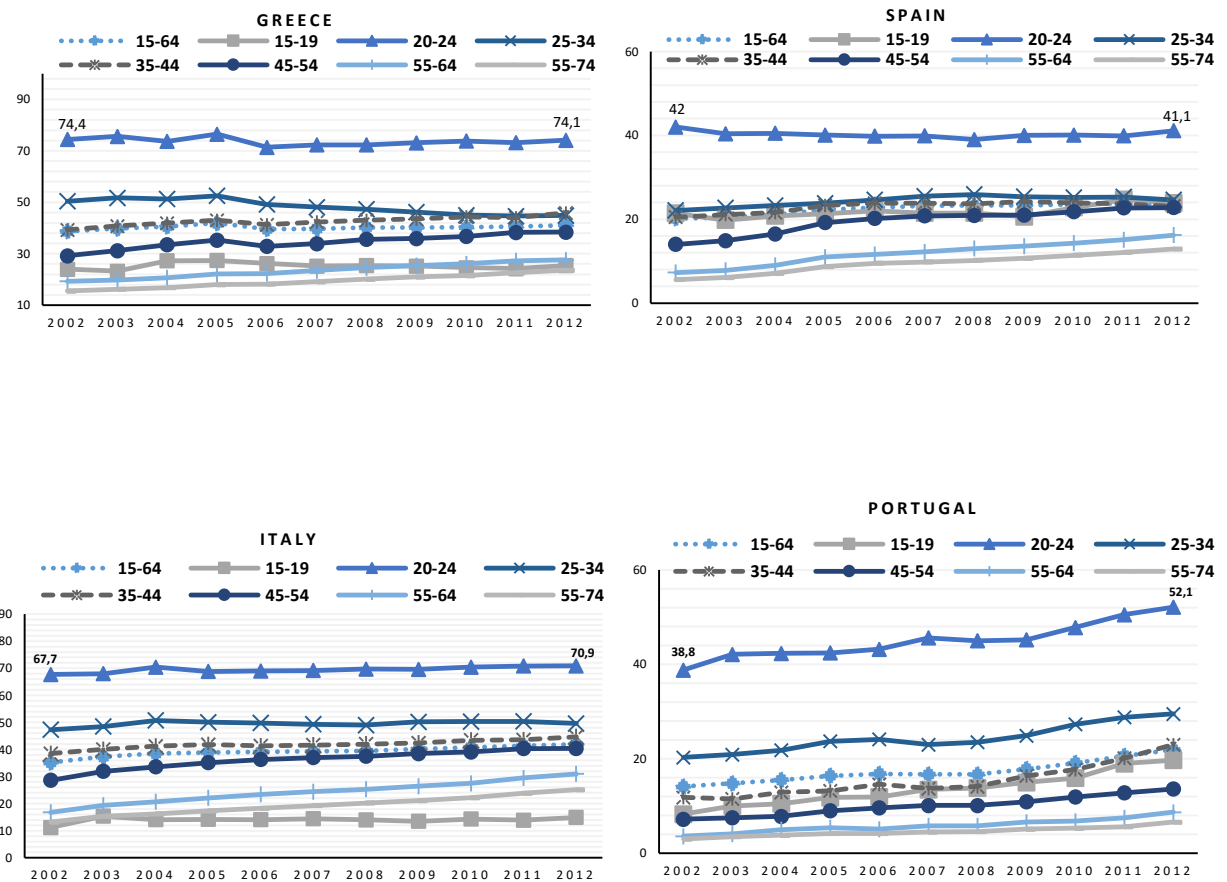
The qualification structure of their populations is very different, as we've seen before and in a generic approach we can conclude that: Greece has a greater proximity to the European Standards and average levels in all educational stages. Together with Spain, represent the countries with higher rates of population holding a tertiary certification. Italy with a more expressive level of population attaining the Upper Secondary, and finally, Portugal presenting improvements in all cycles, although maintaining a large share of the population holding only the primary and basic cycle.

Reporting the upper secondary attainment (46,6% UE27 in 2012), on one side, we have Spain and Portugal with lowest rates, considering ages 15-64, of 23,7% and 21,9% respectively, and on the other side, Italy and Greece, that almost doubles the first two cases, with 41,9% and 41,1% respectively. All countries increased in this indicator between 2000 and 2012, particularly Portugal in 7,8 p.p. (figure 4.12).

Younger ages are clearly overrepresented, especially the group of 20-24 years old (64,4% EU27 at 2012), reported as the category with more people holding an upper secondary certification in all four countries: Portugal, 52,1% (plus 13,3 p.p since 2002); Spain 41,1% (slightly decreased since 2002 in 0,9 p.p); Italy 70,9% (plus 3,3p.p) and Greece 74,1% (slightly decreased since 2002 in 0,3 p.p). But increases were also registered at oldest ages, showing the generational effect of the increasing of this level in last decades; the relevance of “Adults Qualification” and the importance of Life-long Learning, and the economic demand of more qualified labour force in the Portuguese case, more expressive

within ages 35-44, 23% (plus 11,2 p.p since 2002), in Spain, Italy and Greece, featuring ages 45-54 (48,3% EU 27 at 2012) by order of reference: 22,8% (plus 10,4 p.p since 2012), 40,4% (plus 11,8 p.p. since 2002) and 38,4% (plus 9,2 p.p. since 2002). (figure 4.12)

Figure 4.12 Upper secondary and post-secondary non-tertiary education attainment level (%), in Greece, Spain, Italy and Portugal, between 2002 and 2012.

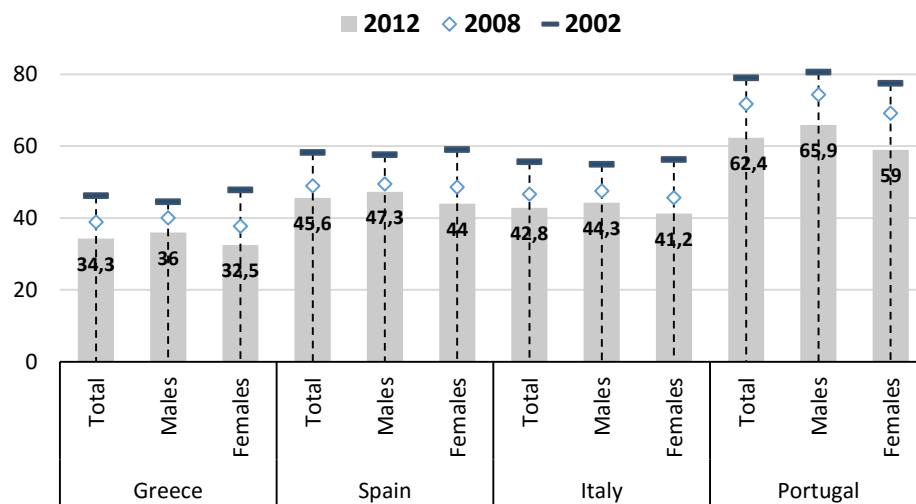


Source: Eurostat

Summing up, the indicator “Percentage of population aged 25-64 below secondary attainment” (25,8% EU 27) expresses the same tendencies, showing the same downward trend in all four countries, still, with differences in results and numbers among countries,

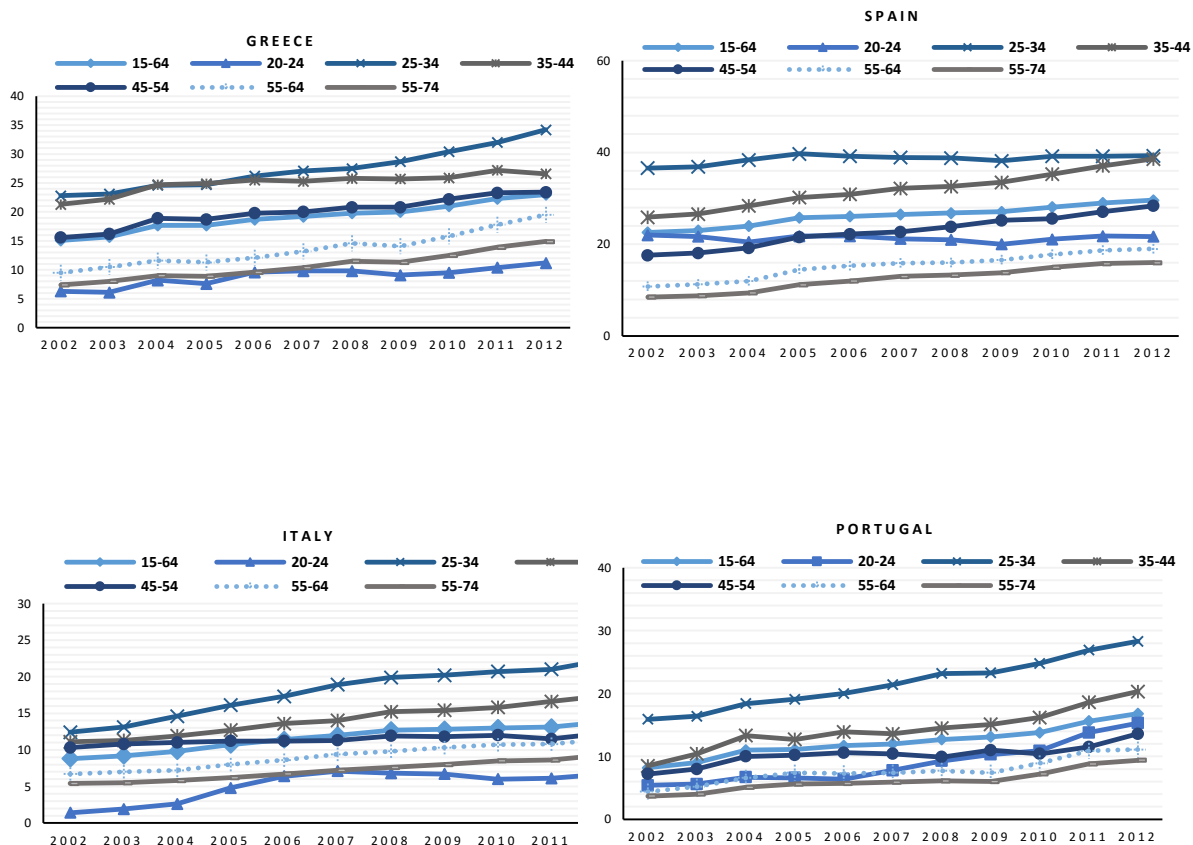
and representative of the fragility of Southern Europe: despite being the two countries with better performances on secondary attainment in general, Italy and Greece at 2012, had still 42,8% and 34,3% of population with at most the lower secondary, while Spain and Portugal had 45,6% and 62,4%, for the same year (figure 4.13)

Figure 4.13 Percentage of population aged 25-64 below secondary attainment



Source: Eurostat

Figure 4.14 Tertiary education attainment level (%), in Greece, Spain, Italy and Portugal, between 2002 and 2012.



Source: Eurostat

Tertiary education attainment have also grown in Southern Europe, between 2000 and 2012. In 2012 considering the age group of 15-64 (24,6 % EU27), on one hand, 29,6% of Spanish population had an tertiary education degree (plus 7 p.p. since 2002) as well as 23% (plus 8 since 2012) of Greek's population; on the other hand, Italy and Portugal, with lowest proportions of population having an tertiary attainment, 13,8% (plus 8,8p.p since 2002) and 16,8% (plus 8,6 p.p. since 2002) respectively. The age group most representative in every cases analyzed, is the 25 - 34 years old (35,5% EU 27): Spain, with 39,3% (although the category with a more pronounced evolution was the 35-44

years old - 38,6% in 2012 with an increase of 13 p.p.); and Greece with 34,2% (more 11,4p.p. since 2002); Italy with 22,5% (almost more 10 p.p. then in 2002) and Portugal, with 28,3% (a growth of 12,4 p.p. since 2002) (figure 4.14).

Why do Spain and Greece have the highest levels of tertiary attainment comparing with the other two countries? And why Portugal and Italy are still showing proportions that are considerable below of the European's average values? The levels of permeability within educational systems are to part of the answer, helping in cases of Spain and Greece, although in the Greek case we can also add the great investment in tertiary branches, the lesser selectivity at compulsory school, and a pronounce favoritism on academic paths at secondary level. As for Italy, the general and progressive decreasing reported in attendance to this cycle, and the investment and major attendance to vocational and training education, may explain the lowest levels in tertiary attainment even if vocational options have permeability of access to the higher education; as for Portugal, the structural problem of qualification for such a long period of time, and the evident early school leaving affecting the secondary level, are determinant to explain the lowest attendance to tertiary and subsequent attainment.

To sum up, despite the differences in results, some regularity can be found as main tendencies of Southern Europe educational outcomes: in general terms, the enlargement of attainment at the two last cycles (Secondary and Tertiary) and the decreasing in the first ones (Basic education); a gap concerning "older generations" and "younger generation", wherein the first ones are mainly concentrated at lower levels of attainment, and the second ones on higher levels; and a recovering verify in oldest categories, especially on secondary attainment, due to Adults Education options investments.

Grade retention and school failure

Retention has been reported by OECD as a measure that increases the costs of education and the negative consequences to society in general:

"School failure and grade retention (...) impose high costs on society. Poorly educated people limit economies' capacity to produce, grow and innovate. School failure damages social cohesion and mobility, and imposes additional costs on public budgets to deal with the consequences"(Equity and quality in education, OECD, 2012, p3.)

Despite the several recommendations from this international educational agency to end or to reduce largely the grade retentions as a selective instrument, those are still shaping Portugal's and Spain's levels of success, as these two countries figures with highest rates of retention among Southern European countries but also at the European's context. The extensive use of external exams, in both countries in all cycles of education can be seen as a "driver" on promoting selectivity and school failure.

"Grade Retention in Schools in Europe" from Eurydice in 2009, reported both Portugal and Spain with rates of retention above 30%, even if those countries described "Grade Retention" as a "pedagogical" Instrument within the educational systems. The percentage of 15 years old pupils who have repeated a year at least once, was at 2009 of 35,3% in Spain; 34,5% in Portugal while in Greece and Italy was 5,7% and 5,3% respectively.

National's data provided by all countries demonstrates that, in Portugal, in Italy and in Greece, the retentions rates at the primary level (ISCE 1) are below 5% and almost null in Italy. Differences are, indeed, registered as the stages of education progresses. In Basic education, Portugal registered 7,4% (2012) in second cycle of basic and 13,3% (2011) in third cycle of basic, as Italy and Greece maintains rates of 3% (2012) and 4,2% (2011) respectively at lower secondary. The fragile position of Portugal becomes more evident at secondary level, where rates reached 20,8% in upper secondary and 34,3% (2012) at the last year of this educational cycle (meaning the year before entering the tertiary system). Once again, Italy had a 10.8% of retention rate in global terms and Greece refers a percentage of 97,9% of all students had passed to next class or level of education. However, Italy "hides" selectivity within the better results presented of as they are becoming particularly high among foreigners, males, and low status students, meaning that educational disadvantage is strongly affected by individual and familiar background of students. The retention rate is also linked with the type of Italian 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 in this group of students, we can observe an underrepresentation of low status, males and foreign students.

Some Portuguese authors and their line of studies are referred (Abrantes, 2008, 2009; Alvares, 2014; Ferrão, 2014) in order to demonstrate that retention constitutes a factor predicting the worsening of early school leaving, therefore, not promoting success. One late research on Early School Leaving in Portugal (Alvares, CIES, 2014) has recently suggested that retention and school failure are clearly the main predictors of school dropping out. Also Maria Ferrão (2014) has referred - in her recent study on PISA 2012 - the main individual and collective negative impacts from retention: overpopulation 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 retention rates, she shows that retention is variable concerning gender (more evident among males pupils), the socio-economic group (more evident in pupils from a disadvantaged social and economic family background) and type of school (public schools and segregated schools). (Ferrão, 2013).

In a recent study, Seabra, Ávila and Castro (2014) 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 among other findings that 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, all from former Portuguese colonies.

In order to change the current scenario, several measures and programs were reinforced in Portugal 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 program “*Areas of Educational Intervention*” and even the NO program with the promotion of qualification of the population). Nevertheless, on one hand, such analysis for Portugal clearly indicates a pattern of retention almost “naturalized” and accepted in schools contexts ; and on the other hand, considering that the last political measures ended, or restructured, since 2011 most of these program (NO; Actions Plans) Failure and school retention are still reshaping largely schools outcomes. (Portuguese report)

In conclusion, the Southern “system” of retention is reported on Eurydice 2011 report “Grade Retention during compulsory education”, as one where retentions “are possible” though with some levels of restriction, especially in the first cycles of basic education. In fact, in all cases, trends points to the increase of rates retentions in Upper secondary, particular in Portugal and Spain. Also, in general terms, being much more prominent among boys, immigrants and at public schools.

Despite Italy’s general results being more positive when comparing to those of Portugal and Spain, failure and inequity is discovered in a major tendency to Italian’s educational system promotes retention grades among foreigners and pupils from a low status background.

Early school Leaving

"Early school leaving" (ESL) is an indicator calculated using data from the "Labour Force Survey" data and concerns the proportion of the population aged 18 to 24 who had completed at least the Lower secondary and had not received any form of education and training within the period of data collecting. Constitutes one of the main key instruments to monitor national educational and training systems with regard to its quality and level of success (not to mention the importance as an indicator relating schools, education and labour market’s structure and levels of professional integration).

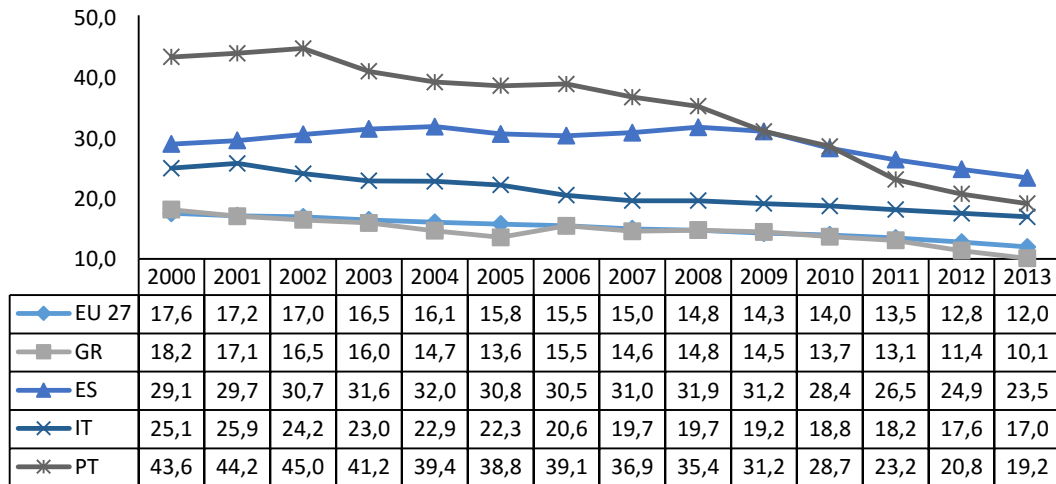
In general terms, represents one positive trend in Europe as it has continuously declining over the years: since 2000 to 2013 it had decrease 5,6 p.p. to 12 % of ESL all of the EU. Several factors can contribute to the decline of this indicator, such as: strong preventing program and schooling promotion; compulsory school; reinforcement of childhood early

attendance; curricular diversification; school offer and different paths; program towards inclusion; career monitoring; youth unemployment; fear of exclusion/marginality; welfare support dependent of the children attendance to school; among others.

The OECD (EAG 2013) recently reported that the Southern Europe countries have had a significant progression in this indicator, fruit of national's policies implemented over the last decades, though with standards still far from the 2020 Agenda's target (10% of early school leaving by 2020).

Data shows a general downward most noteworthy in Portugal and Spain, even though these countries maintain high rates (19,2% and 23,5%). Portugal decrease 24,4 p.p., as a result of schooling and compulsory education extension, and other several program developed to combat this phenomena; Italy declined the ELS rate to 17% albeit reported by its lower annual progression (ETG 2013); and Greece having a better performance with a rate of only 10,1%, reaching the 2020 target. (figure 6.15) The ESL impacts the qualification structure of the countries, showing that those with the utmost deficit in qualifications at higher educational attainments, are also those with more propensity to highest ESL rates. Nevertheless, and following the analysis, ESL's rate of evolution is illustrative of the convergence and can be considered as positive educational development in Southern Europe.

Figure 6.15. Early school leaving (ESL), in EU27, Greece, Spain, Italy and Portugal, between 2000 and 2013.



Source: Eurostat

Considering the questions of equity this indicator follows similar trends detected within other indicators: tendency to be mainly expressive among male pupils; immigrants; and students from a disadvantaged social background.

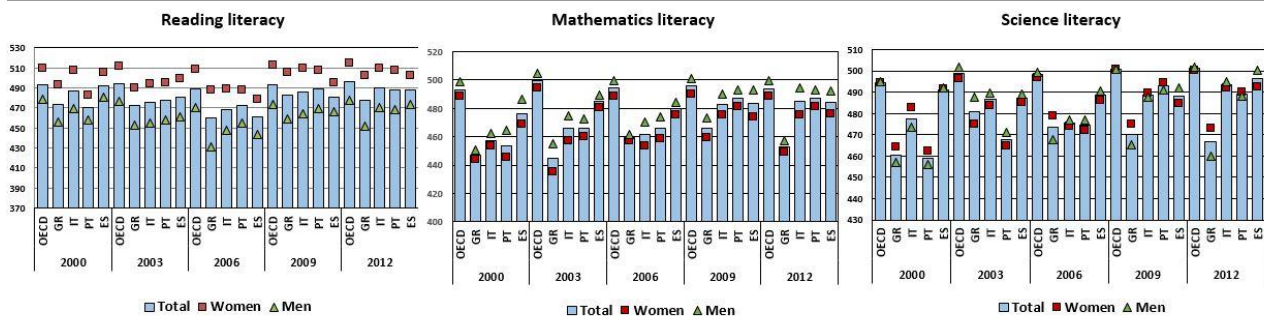
There has been much discussion concerning the reasons and factors that promote, or predict, the ELS. More than work or professional's conditions and labour national structure, or even levels of employment; both Italy and Portugal reports refer the internal fragilities of their educational systems: mechanisms inducing selectivity; lack of supportive instruments for vocational guidance; teacher's labour conditions; retention and school failure.

The nature of policies, the dual certification offers, the professional courses and program toward success, altogether can provide important prevention measures to school dropout, notwithstanding, and since this phenomena differs at national contexts, and within national contexts at regional level, are necessary more targeted measures and greater involvement of local communities and families in general.

Students' performance in Pisa international assessment

Last global PISA results (2012) showed European Southern Countries in a path of convergence when relating with the OCDE's averages, and even, targeting it at the level of other European countries. In general terms, and with some exceptions, increases were seen in Mathematics, Science and Reading scores.

Figure 4.16 Reading, mathematics and science literacy, in OCDE (average), Greece, Italy, Portugal and Spain, 2000-2012



Source: Organization for Economic Cooperation and Development (OECD), Program for International Student Assessment (PISA), 2000, 2003, 2006, 2009 and 2012.

Reading Literacy - (OECD's average score of 498 points in 2012) – globally the Portuguese results although registering a slight decrease between 2009 and 2012, increased in 18 points, with score of 488 at 2012; which is the same score observed in Spain; at the same time Italy had 490 in 2012, the highest score in the four countries, and the nearest one to the OCDE's global average; Greece had the lowest performance with 467, however improving more 6 points since 2000 (figure 4.16).

Mathematics Literacy (OCDE's average score of 494 points in 2012) corresponds to an area where results are more linear with increases in all southern European countries – in Portugal results increased in 33 points with scores of 487 in 2012, the highest result within the group, followed by Spain and Italy, with scores of 484 and 485 respectively, and Greece at the lowest score with 455 (figure 4.16).

Science Literacy (OECD's Average of 501 points in 2012) is perhaps the area with higher performance, particularly in Spain with 496 in 2012 (although with a major decreasing

between 2006 and 2009) and Italy with 494. Portugal increased 30 points to 489 and Greece presents a score of 467 (figure 4.16).

Some trends can be perceived: OECD averages are oscillating over the years results in Science and Mathematics as the result of changes in countries' performances; Portugal was the country with more prominent increases within the period considered although yet looking for greater improvements; Greece presents the lowest scores in most of the analyses and areas.

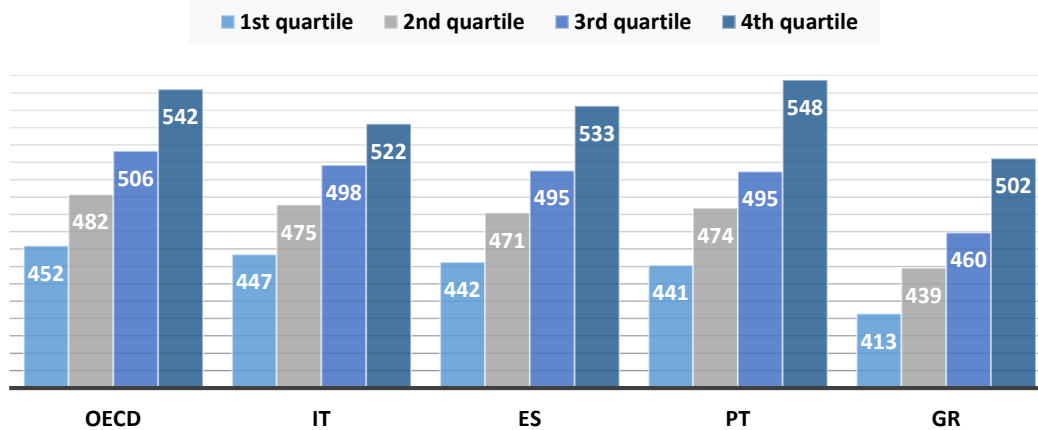
Although PISA corresponds to one important international assessment, several critics questioned its major influence on national educational policies and less positive educational outcomes: endorsement of external exams; establishing "ranking" among schools and students; augment of selectivity. Following these critics, Greece as the country with worst performance in PISA, reports great discrepancies between national exams and PISA results, namely the Panhellenic exams (to access the university), having shown improvements in students grades and turning access to the university more competitive in 2014.

Concerning equity, and using PISA data, it is also shown that the Socioeconomic Status continues to weight on school performance in Southern Europe, particularly in Portugal (students from the last quartile had a score of 441 while students from the first quartile 548¹⁴) and less visible in Italy. This means, that despite the evolution on results, levels on inequality are still major characteristic of southern educational systems (Figure 4.17).

The same trend is observed amongst the results from immigrants (first and second generations) and native students, where the first ones are in general presenting worst performances in PISA. In countries like Spain and Portugal, the major differences in results are seen between native students and immigrants of first generation, as Italy tends

¹⁴ The indicator is calculated based on the following variables: - Parents occupational status (HISEI)- Parents' educational level (the highest) - measured in years of education and following the ISCEDD (PARED) - Household Goods - (HOMEPOS12)

Figure 4.17 Mathematics literacy (average), according to index of economic, social and cultural status (ESCS) by quartiles



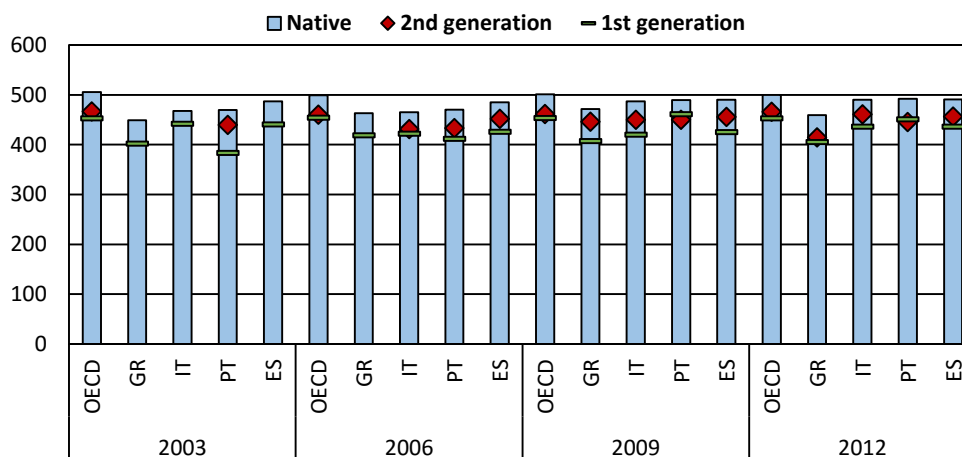
Source: Organization for Economic Cooperation and Development (OECD), Program for International Student Assessment (PISA), 2000, 2003, 2006, 2009 and 2012.

to augment differences within the group of immigrants (first generation with better results than those from the second generation). (Figure 4.18)

To sum up, despite the general improvement in international assessments and the approach on key educational indicators and the general engagement on a path of convergence, Southern European countries are still incapable to revert the levels of inequality expressed on educational indicators, particularly when comparing results of the “native students” with those from an immigrant situation or background –differences are in general rising; or still, presenting a clear and active “social” effect in educational results.

This point to one of the main arguments present in this work: even being the target of international political attention and guidance, national efforts and political internal dynamics are the true determinant to the observable results. We can question the real effects of international rankings and exams within this matters and if the fragile position of the Southern Countries is still a “structural” evidence and in which sense.

Figure 4.18 Averages for mathematics, age 15 years, by Index immigration status, 2003-2012



Source: Organization for Economic Cooperation and Development (OECD), Program for International Student Assessment (PISA), 2000, 2003, 2006, 2009 and 2012.

4.6 Strategies for promoting success and equity

Following the previous section, and having awareness of the backwardness of Southern European in educational performance, it can be identified several policies which were implemented during the last decades to improve educational outcomes and international ranking positions, and how this continuity and persistence allowed countries to recover on indicators such as PISA assessments or ESL rates.

The identified strategies to promote school success and the reduction of social inequalities in education were intensive in countries like Portugal, with a persistent set of national programs and measures targeting school failure and child labour since the middle 1980's, but less visible in Italy, Greece or Spain. Yet, the focus remained similar: ending, or reducing Early School Leaving; boosting “universal” scholar access and success; guaranty of equity and positive “social” outcomes from education.

These types of strategies, or strategic plans, being at the core of the domestic policy-making, are also variable according to the main political orientations. These dynamics

explain why in Italy, a country marked by an unstable political frame concerning education, school success policies are mentioned or reported as unstructured at national level and mainly regionally based; and, on other turn, why Portugal presents different periods with different acceleration levels of recovering and in some cases and in particular years, discontinuity in policy-making (mainly since 2011).

In Portugal, between 2000 and 2010 we registered, in terms of policy making, a path marked by general continuity with measures targeted both school participation and school success. Among the several specific programs in the period considered and particularly since 2006, we can summarize: National Reading Plan; Portuguese Second Language program; Mobile School project for itinerant workers; and the Educational Territories of Priority Intervention (TEIP, inspired in the 1960 UK *Educational Priority Areas* and the 1982 French *Zones d'Education Prioritaire*). Among 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, motivated the interruption of all other programs and measures.

The TEIP is in its Third Program form (TEIP3) established by Normative Dispatch n°20/2012 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 social environments. The 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 in 2012/2013 to a total of 137 schools across 5 Regional areas: 49 in the North, 11 in the center, 49 in Lisbon and Tagus Valley, 17 in Alentejo 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 and school violence; 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 teachers satisfaction, the increase of family-school interaction and the inclusion of community in school's activities. Also, the decrease of absenteeism, indiscipline and increase in success rates, overcome the national rates in same cases.

Despite the significance of the set of these measures we must underlined the current interruption of some important actions taken by the current Portuguese government: ending the strategic plans for reading and math's; the end of the mobile school project; and the strong reduction of the extra-curricular components. (Portuguese Report)

Greece, among other measures concerning improvements on teaching and the learning process, reports resembling measures to the Portuguese's TEIP, yet having no widely available information of it, apart from the informal channels reporting that these measures of compensatory teaching and other educational measures on supporting and promoting success had ceased most because of the budgetary cuts. It is also perceived an existing gap on national policy-making concerning this particular sector.

In the Italian case, the period 2000-2013 is characterized by a long political debate concerning the absence of a structural reform providing an improvement of the Italian educational system in terms of its equity and quality, even if attempts of reform (i.e. Berlinguer, Moratti and Gelmini Laws), carried out by both centre-left and centre-right governments, were only partly implemented and repeatedly postponed or abandoned (Moscati, 2008).

Since 2000 until 2013, a few national measures for improving educational performances are clearly reported, namely 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 experiences; or, extraordinary funding's dedicated to groups at risk of educational failure (i.e. funding for "areas with high concentration of immigrant pupils" since 2001; the National Plan "Italian as a second language" for newcomer students operating since 2008).

The early school leaving still represents a *neglected problem* within the social and political agenda in Italy, due to its endemic nature and to the scarce pressure by the public opinion and the media (Colombo, 2010). However despite 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, 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. (Italian Report)

In Spain we can also observe a lack of national structured plans concerning educational success, although most measures are concretized at regional level (mainly due to the political architecture of the Spanish State). It is briefly reported strategies concerning special need education and several support measures created within this area of intervention, or even ordinary measures designed for all students of the educational system. Among them some can be mentioned: successive levels of curricular development, involving the progressive adaptation of the official curriculum and optional areas and subjects, which constitutes a resource in the hands of teachers and pupils to enhance and develop their personal preferences; the organization of reinforcement and support activities in schools; a very generalized measure of attention to diversity which is usually aimed at core areas (mathematics and language) and specific grouping. Since 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 of the autonomous communities have regulated and organized these services through educational and psycho-pedagogical interdisciplinary guidance teams and through the guidance departments of secondary education establishments.

The previous analysis shows that all four Southern European countries presents great levels of recovery in some important educational indicators which is seen as a general rise of levels of success and positive outcomes from each national educational systems. Nevertheless, within the international context and as it was mentioned before, fragilities still characterize these countries 'educational systems, particularly concerning the retention levels and the selectivity expressed in different results among different groups of students, or the expressive numbers of population holding low qualifications.

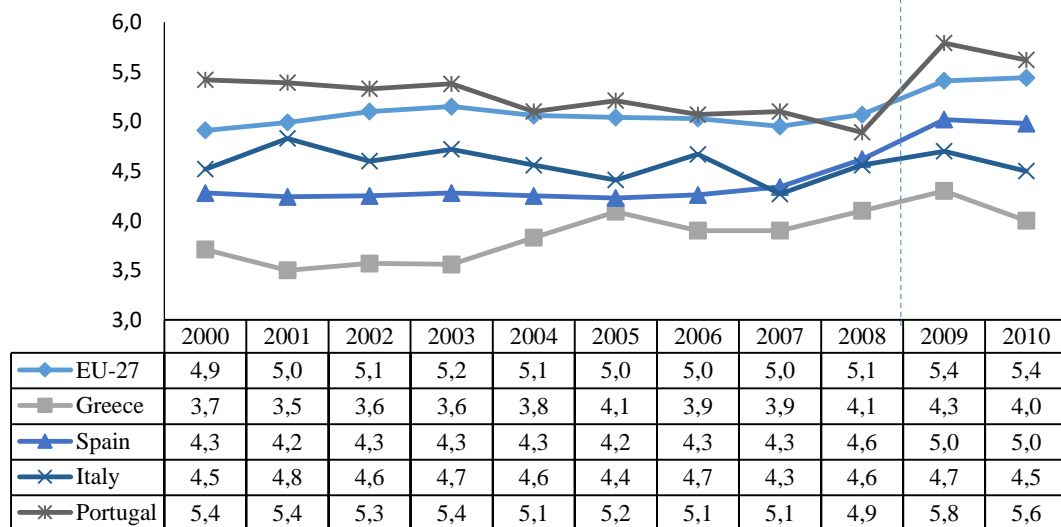
In general in terms of educational planning, concerning specific groups of student's population or the general success of educational systems, the same priorities can be observed: the will to control Early School Leaving; to prevent social selectivity of the system; the need to increase educational success and rates of transition. Portugal, with very centralized governance in educational policy-making and implementation, shows worst results in some indicators, presents specific national measures in order to reverse the negative results – TEIP is one major example – even if some of these measures have recently been discontinued. In this sense, the other three countries have no central planning or replace it for regional measures to promote school success.

4.7 Dynamics on Education expenditure and funding

In general terms, cuts in educational expenditure and restrictions on educational priorities were made across the Southern European territory, which is mainly characterised as a measure of budget adaptation within a context of crisis, and less as an ideological choice. Although, in case of countries like Portugal, presenting cuts in specific educational areas (like Adults Education, or Special Education), it can also seen as an amalgamation of both realities.

The Eurydice Report (European Commission/EACEA/Eurydice, 2013) on education and crisis, shows that cuts in education budget were seen in twenty European countries, but particular strong in Greece, Italy and Portugal.

Figure 4.19 Public Expenditure on Education, as % GDP, in Greece, Spain, Italy and Portugal, between 2000 and 2010.



Source: Eurostat

Social scholar support

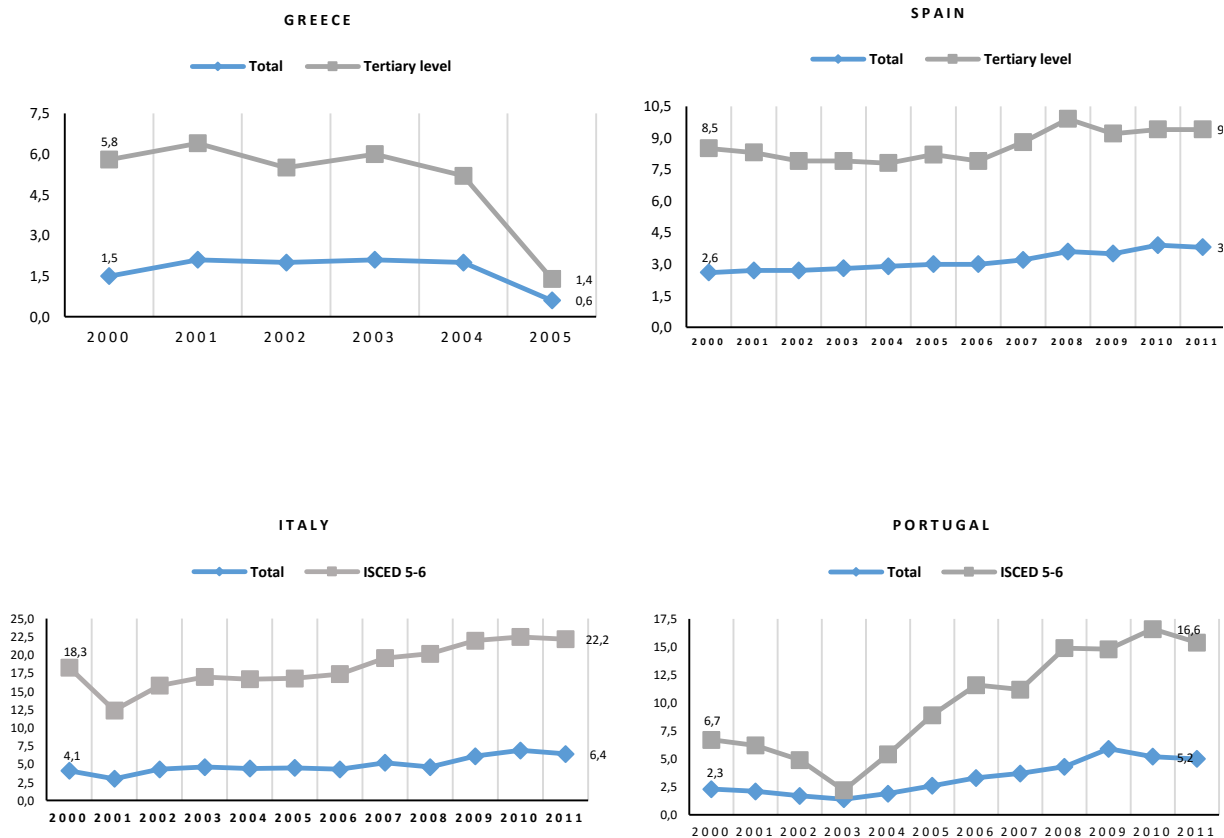
Considering public educational expenditure and equity, social scholar support reveals to be one of the most important indicators.

On one hand, it is linked to equity and equality of opportunities, guarantying the universal access to education by providing monetary support to those in need, school supplies, meals, transport, scholarships and loans. Data have shown an increase in expenditure considering Social Support, between the years of 2000 and 2010 in general for all countries pointing that the major cuts were made in other sections of the educational expenditure.

Portugal raised the financial aid from 2.3 % to 5.2%. The tertiary education remained with the highest level of expenditure (16.6% in 2010), where scholarships corresponds to the main object. Spain with also an increase between 2000 and 2010, although with a

slightly decreased between 2009 and 2010, presenting 3,8%, with the main expenditure concentrated at the tertiary level (9,4%); the same scenario seen in Italy with 6,9% of financial aid in general terms and 22,5% in Tertiary education; and, finally, Greece representing one particular case, once there is no available data starting the year 2006 until 2010. However using the remaining data we can underline, on contrary, a path of decreasing in this particular indicator.

Figure 6.20 Financial aid to pupils and students as % of total public expenditure on education, in Greece, Spain, Italy and Portugal, between 2000 and 2011.



Source: Eurostat

Despite the general and positive evolution on financial aiding, we must emphasize that the diachronic period under analyse is not representative of the worst period of the crisis, which is precisely from 2010 onwards, where the austerity measures as the result of the financial rescue plans were introduced.

In terms of specific politics reported, in Portugal, since the approval of the Basic Law of Education 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, when the number of beneficiaries of School Social Support (Ação Social Escolar – ASE) was enlarged and a relation between family income and state subsidies to families 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)¹⁵ for the 2nd cycle of basic education, the number of students covered has doubled from 237,257 in 2007/2008 to 527,576 in 2008/2009. No recent figures are available, although plenty news in the media point to a strong decrease after 2011/2012. On the other hand, given the universal aspect comprising the Portuguese educational system, school social support does not concerns only to specific segments of monetary aiding, ensuring in addition the universality of school transport, school canteens, the distribution of ‘school milk’ in basic schools, and merit scholarships.

However, national Portuguese 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

¹⁵ 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.

students have lost their eligibility conditions, independently from their actual need.
(Portugal report)

On the other way, the other country to present a more detailed vision on policies within this sector was Italy. One first idea is mainly reinforced: Social school support is not a clear subject in Italy, with little data and information, most of all in cause of being services characterized by a recent history and territorial heterogeneity. In a different way from the centralized focus in Portugal, the territorial rooting of the measures makes difficult to achieve a global vision. The main measures are in general similar to those of Portugal: support in food, transports, books expenditure, but funded by local governments. In cause of such territorial programs it is reported differences in terms of levels of need's demonstration. 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 Italian legal framework, a Decree Law "The education starts" (12 sept. 2013, n. 104), the Letta government promoted welfare interventions for students and their families: in 2013/14 15 million 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. The promoted right to education in tertiary education also allocated support for the students without economic resources, providing scholarships ("borse di studio") as its main measure and 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

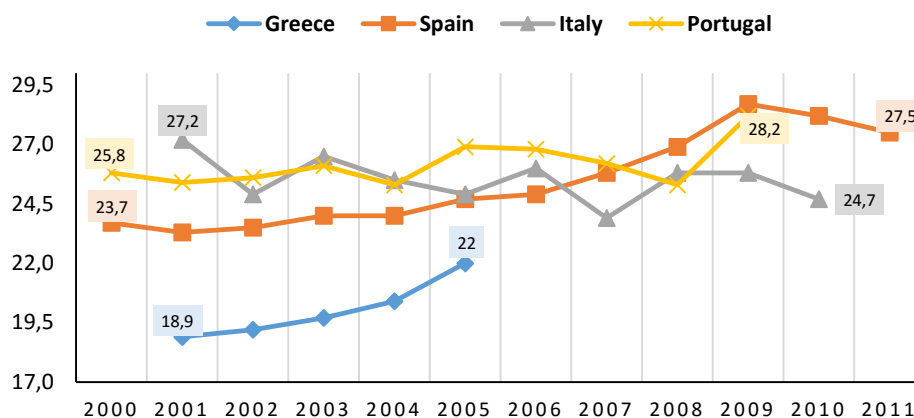
resources funded by national government and region. Among 100 students entitled to the scholarship, 72 received it in 2002/03 and 75 in 2010/11. Moreover, there are great differences between the North and South of Italy: in the North 90% benefits from a scholarship while in the South only 60% does (Laudisa, 2012). However the policies for accommodation have had a good development, since the number of available 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 away from home (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, and this kind of service remained stable in the last ten years. Italian universities still have a limited number of canteens, and in 2010/11 there were 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 scarce 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 provide tools and services suitable to guaranty the education rights, haven't been improving the condition of disadvantaged students yet.

The Italian increase within this sector 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. (Italian report)

Expenditure per student

Figure 6.21 Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents



Source: Eurostat

OECD (2013) reports that in many countries the rising of this indicator has not kept up with the increasing of student's enrolment. This is a composite indicator aggregating indicators such as teachers' salaries, class size, teacher-student ratio, and it is also variable according to the level of education. Different priorities are seen in the process of allocating resources, explaining the differences in levels of expenditure at the primary, secondary and tertiary. Although the last mentioned level comprises a different position within this analyses, since enrolment is dissimilar as well as the financial mechanisms.

In general terms, meaning the total of expenditure, the indicator started to decline after 2009 (even if only have more recent data for Italy and Spain, and almost no available data for Greece) (figure 6.21). Spain has the highest rate in every cycle, in each case above the averages from OECD; Portugal presents the highest rate, considering level secondary; Italy as the only country having rates of expenditure bellow the OECD average and with a stable development of the level of expenditure.

In Portugal, the level of expenditure by student between 2000 and 2009, stays in a regular pattern, registering an increase – from 25.8% to 28.8%. (Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents, figure 6.2.1) Nevertheless the available data is not coincident

with the years where expenditure decrease was most evident, mainly since 2011. Portugal had decreased the numbers of teachers and increased the numbers of students per class, situation which can have significant impacts in this level of expenditure. The differences in expenditure among primary and secondary are considerable: 21.3% in primary and 32.1% at secondary, where the teachers' salaries are also different (higher on secondary) and classes with more students. Tertiary presented a clear rise between 2000 and 2009 reflecting the enrolment and the investment on this sector: from 28,4% to 39,3%.

Spain spends comparatively more per student than other OECD countries. Globally, expenditure per student at primary, secondary and tertiary levels increased by 13% between 2005 and 2010, as expenditure increased more than enrolment. The general levels of expenditure rose to 27,5 % in 2011, with a visible increase in the Tertiary level: 40,8%. Ensuring that 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 the Italian case, from 2001 to 2010, the annual expenditure per student decreased from 27.2% to 24.7%, (Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita), based on full-time equivalents in particular at the educational levels corresponding to ISCED 2-4 and 5-6. 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. 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.

Greece remains the only country having problems and difficulties concerning the available data on financial matters, an increase of 2,3% in expenditure is observed from 2001 to 2005.

Funding - public and private

Southern European's educational systems are mainly public funded. Particularly considering the compulsory education – primary, secondary, - and the post-secondary and non-tertiary education.

The economic crisis affected directly the budgetary and funding systems of Education in these countries. As it has already been said, we report a massive dismissal of teachers and high numbers of teachers with no place in schools in southern countries, as well as the interruption of some educational programmes (as it was occurred in Greece with the interruption of the measures towards adults education), or other several restructurings within the educational systems.

In Spain, the loss of a high percentage of staff meant that school practically has ceased all extracurricular activities and compensatory classes and also meant more additional students per class (Spanish report, 2015) With the same trend, Italy also reported that average class size increased as well the student/teacher ratio.

In regards to Greece, its well know that the recent lack of data does not allows to fully understand (or even describe, in some moments) the extension of the budgetary cuts, but several factors reported, were revealing of public funding reduction on education: students transport may be stopped in some areas 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. Cuts on education personnel were also a reality: teachers in primary but mostly in secondary education, adding the severe salaries' cuts. Almost no new teachers are placed within all levels of education. The administrative personnel have been also affected and being limited in education as well as in other institutions in the public sector (see also Kantzara 2014, Prokou 2014a). Another area of impacts refers to educational policy measures and reforms: two waves of reorganising education took place. One part of the measures referred to primary and secondary education and one on tertiary. It included building maintenance, school units, university departments and personnel, particularly in primary but mostly in secondary education, after 2011. (Greek report).

In the last years, Portugal funding dynamics are quite revealing of the sectors considered to be of most importance in educational priorities. And despite the global expenditure decreased in last years, this occurred mainly considering human resources restructuring and salaries cuts, and by establishing priorities in education in terms of its efficiency, meaning here that specific educational programmes and options were more significantly penalized. National data from the Portuguese report “State of Education” (Estado da Educação, 2013) shows 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 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 registered at 2013.
- An increase in adults’ education level of state expenditure - from 25 million to 43 million in 2013. In 2010 this level of expenditure was 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%. (Annual expenditure on public and private educational institutions per pupil/student compared to GDP per capita, based on full-time equivalents). Nevertheless the available data are not coincident with the years where expenditure decrease was most evident (meaning since 2010/2011).
- The level of expenditure in Tertiary has decreased from 1067 million in 2005 to 990 million in 2013 (it reaches the maximum level in 2010, 1299 million).

Within this level of analyses, it is also important to underline the systems of governance and state relation with education and schools funding, which can be determinant for the expenditure's dynamics: so, in Portugal, Italy and Greece, with a more centralized framework, public funds are controlled within a central and common government, while in Spain, the shares of public funding are also managed at a centralized framework but, as it occurs with all educational subjects, are controlled and implemented autonomous in each region.

In general terms some new trends are detected along with the present recession, changing the shares and levels of private and public funding on educational institutions. Mainly, we report the increase of private funding share in some areas, particularly on the tertiary. OECD last report (Education at Glance, 2015) reveals that Italy, Portugal and Spain decreased their public expenditure on educational institutions. Between 2010 and 2012, all southern countries have great losses on their GDP and it is reported that public expenditure on education follows a trend of decreasing: more than 5% in Italy, Portugal and Spain.

Considering the public and private funding and expenditure – meaning by source of funding - on educational institutions within primary, secondary and pos-secondary non tertiary, we observe that public sources of funding decreased in the overall educational expenditure between 2005 and 2012. Portugal is one of the most evident cases: the 99,9% of funding that came from public sources in 2005 passed to 85,2% in 2012, which meant that private sources (basically family contribution) had an astonish increase from 0,1% in 2005 to 14,8 % in 2012. Similar trends are registered in the other southern countries, particularly Spain, which had already a considerable share of private sources funding educational institutions (6,5% in 2005 from households rose to 10,5% in 2012), and less visible in Italy (private sources of funding – households - had passed from 3,7% in 2005 to 4,4% in 2012.)

Table 4.6 Relative proportion of public and private expenditure on educational institutions by level of education 2005, 2011, 2012 – primary, secondary and post-secondary non tertiary

	Greece		Italy		Portugal		Spain	
	Public sources	All private sources	Public sources	All private sources	Public sources	All private sources	Public sources	All private sources
2005	92,5	7,5	96,3	3,7	99,9	0,1	93,5	6,5
2011			96,2	3,8	99,9		91,1	8,9
2012			95,5	4,5	85,2	14,8	88,7	11,3

Source: OCDE, Education at a Glance, 2008.

Table 4.7 Relative proportion of public and private expenditure on educational institutions by level of education 2005, 2011, 2012 – tertiary education

	Greece		Italy		Portugal		Spain	
	Public sources	All private sources	Public sources	All private sources	Public sources	All private sources	Public sources	All private sources
2005	96,7	3,3	69,6	30,4	68,1	31,9	77,9	22,1
2011			66,5	33,5	68,6	31,4	77,5	22,5
2012			95,5	4,5	85,2	14,8	88,7	11,3

Source: OCDE, Education at a Glance, 2008.

Also in the tertiary system, public funds decreased along with a progressive increase of private shares of funding (where we include household expenditure). The fact that states started to decline in their direct and public sources of funding on educational institutions,

expecting that families' efforts could support part of the expenses, is one the most visible trends and results from austerity strategy to deal with the financial and budgetary crisis. In fact, public sources of funding and expenditure (expressed as a relative proportion on expenditure in tertiary, OECD) had fell in all southern countries: in Portugal from 68,1% in 2005 to 54,3% in 2012 ; in Spain from 77,9% in 2005 to 73,3% and in Italy, from 69,9% to 66% in the same years. On the other side, the account of households share on expenditure had rose considerably: in Portugal, from 23,4% in 2005 to 35% (private sources altogether corresponds to 45,7%) in 2012; in Spain, from 18,7% to 23% (private sources altogether corresponds to 26,9%); and in Italy, from 18% to 26,5% (private sources altogether corresponds to 34% of funding).

One note goes to the Greek case, where data concerning the matters of finance and funding for recent years are not found.

Conclusions

- Equity is compromised by budgetary constraints but also by specific choices in policy-making: the example are the end of educational programs in Greece and Portugal and the cuts in some educational sectors in Portugal.
- Scholar success is clearly linked to social background, affecting equity promotion. PISA's results continue to indicate that the Socioeconomic Status impacts considerably on school performance. 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, although with worsts results in Spain and Portugal.
- The current intensification of vocational areas and Dual systems, observed in all countries, exemption of Greece; early tracking seen in Spain and thus, on Portugal, with the recent proposals for introducing vocational areas at the end of lower secondary.
- Compromising the equity by diminishing the process of inclusion of certain groups of students, like we have seen with special education; being also this much more evident in Portugal;
- Different adult's educational options and paradigms followed, as well as the different results.

- Portugal presents a singular position: both party ideology and the pressures from the crisis are explaining factors of educational results and equity reduction.
- On a contrary trend, Italy presents several recent measures reshaping educational policy making in a much more progressive path: promoting Special Education, changing the centres for adult's education, among others.

Chapter 5- Equity in times of crisis and Political Choices

5.1 Tendencies in Southern Europe: Convergence within a context of Globalization and Europeanization

The subject “Education” in Southern European countries is marked by two significant paths (meaning having the awareness that equity – or education’s equity promotion – is perceived or interpreted within different national paths):

1 - On the one hand, and reporting the earlier chapters, by a consistent “recovery” confirmed in several areas of the national educational domain such as those related with people’s qualification; as well as, the convergent results in which we include the levels of equity by means of the education systems’ improvements; Diversification of educational policies and an effort taken in the last two decades, in order to improve educational results, the general scholar success and the schooling attainment of the majority. This convergence was more intense until the crisis.

2- On the other hand, the vicissitudes of the recent economic crisis, the financial decline, the austerity measures and the specific political response from each country ever since, that have had impacts in the educational context particularly considering the budgets “cuts” and some political options - Even if we sustain the existence of different rhythms and different political frameworks of the Southern Countries within this period.

Part of the project’s conception was linked with some hypothesis and points considered of most importance to the analysis, including:

1 – Following the recent theoretical lines in the studies of the welfare states (Moreno – Fuentes, Klose, 2013; Moreno, L., 2006), the rejection of the existence of a “model” with regard to southern European countries’ educational systems and education outcomes. Meaning that despite some linearity found in terms of the curriculums and the organization of educational systems, moreover seen in all countries in Europe (for instance, as it occurred with the Bologna process in the tertiary system) which resulted from an intensive modernization and globalization processes (known also as the

Europeanisation process), it was assumed that the different educational outcomes were, in fact, expressive of different policies at the national context and of different national priorities, resulting in the assumption that Education Systems serve firstly the national needs.

No one rejects, however, the importance of the international influence, much evident in some educational issues highlighted in Southern Europe countries, as part of its own policy choices and its educational agendas from 2000, within the boost of Lisbon Strategy, until the present day within a context of the Horizon 2020: for instance, the development of the professional and vocational courses; the adults education; the development of pre-school and its universal access; creating measures in order to solve the early school leaving phenomena, among others. What we have notice then, was that the four southern European countries, which were on a path of convergence, progressive growth and development of their educational systems, were, at the beginning of the Crisis, placed differently in terms of their educational results - see for example the levels of qualifications of each country during the years analyzed – Portugal with a poorest level of general qualifications despite a recovery seen in the “Early School Leaving”, or the expressive numbers of adults involved in actions of education and training; Spain with largest expression of the tertiary attainment; Italy with a largest expression of the secondary attainment; and finally Greece, since the earliest years analyzed with a structure of qualification quite similar to the European levels. This points to at least two main ideas: 1- that the southern countries within the crisis process, started with different educational levels and differences seen in their own educational outcomes – adding the differences observed in terms of its economic indicators, the levels of unemployment and employment, among other; 2- that “austerity” promoted at international context had tried, to some extent, equalize and reduce the southern countries to one same “bloc” most responsible of the effects of the crisis within their own backgrounds and problematics. Naturally that this was most obvious in the economic and financial sector, but fields such as education did not escape from the European and the Troika’s scrutiny.

2 - The national political field and national policy-making in education was, invariably, determinant to the educational results achieved in Southern Europe countries. National efforts – seen on the progressive and positive educational outcomes for the period considered - have sought to follow the European trends and to respond to the international

highlighted educational priorities, and this was quite visible considering for instance the development of the Long Life Learning agendas, more evident on the national political strategies from Portugal and with the results achieved in Spain. Nevertheless, the external influence started to assume another character since 2008, due to the eminent crisis, with other pressures and later with international intervention in southern countries' economies, in which Education had suffered with "cuts" on its state finance and restrictions on levels of expenditures¹⁶: this was visible with the dismissal of teachers across the countries, stronger in Greece and Spain; the increase in the number of students per class, among others. It became important to understand the level of the impacts of the crisis in education in two different ways: on one side, educational and financial measures that clearly were taken as an "adaptation" to a context of crisis; and, on the other hand, assemble and analyzing the nature of the educational measures resulted from national specific educational agendas.

3- The crisis has also brought a general political change in Southern European countries. The tendency was seen in the government's shift to a more right-wing and conservative character – exception on the Italy case. This shift can also explain several of the educational outcomes occurred within a context of crisis and, most importantly, the type of political choices taken on education. This means that one part of the results and some of the negative outcomes detected can be actually explained less from the crisis impacts but mostly by the political-choices and the ideological framework.

Considering the last mentioned point, the project had explored the potential of the financial and economic crisis serving and explaining the political changes and the "reformist" trends in education. The authors of the book "Crisis and Changes" (ref 2006) had already explored how the contexts of "crisis" - or the construction of a "narrative of the crisis" within the institutional structures - fuelled an entire system of changes (internal and external) in policies, with other restructuring seen in the relation between actors; the weight of coalitions; or the manoeuvres of the elites; i.e., how it can potentiate and justify the beginning of a "lineage" of major reforms and political restructuring in important sectors, with further major changes in the institutional sphere. In fact, we can assume that a macro-economic context of crisis has a profound impact on institutions and in their

¹⁶ See the last results on EAG 2015 where, in general terms, levels of public expenditure in education fallen in southern Countries between the years 2000 and 2012, and rose on the private sector.

reproductive capacity to the social context. And, although our argumentations stands distinct from what the authors had worked in their study, we can establish some bridges: one Crisis can generate different "crisis narrative" commonly appropriated by political actors. Within a context of crisis, meaning within an economic recession, we can expected at least two levels of social action/reaction: on the one hand, an open social protest, and considering here the Education, this was seen by several protests by the teachers' unions; students and other agents; On the other hand, catching up with the authors vision, the political actors and their so-called "reformist" track looking for a "plot" sufficiently plausible for the alleged change in education policy and for the maintenance, or restructuring, of the "status quo" of the main actors involved by the political lines. This also conducts to a major sense of crisis. And in the southern countries this was seen with the "social crisis" fuelled by the massive levels of unemployment and the growth of the social inequalities.

Nevertheless this corresponds to one of the hypotheses that is at the centre of the project, once that have a substantial sustenance considering the follow lines of argumentation: the Southern European countries labelled as one modal group; in need of a severe austerity, internationally controlled; and a whole narrative based on clichés: "the main responsible of the crisis"; "living beyond their own capacities", among others.

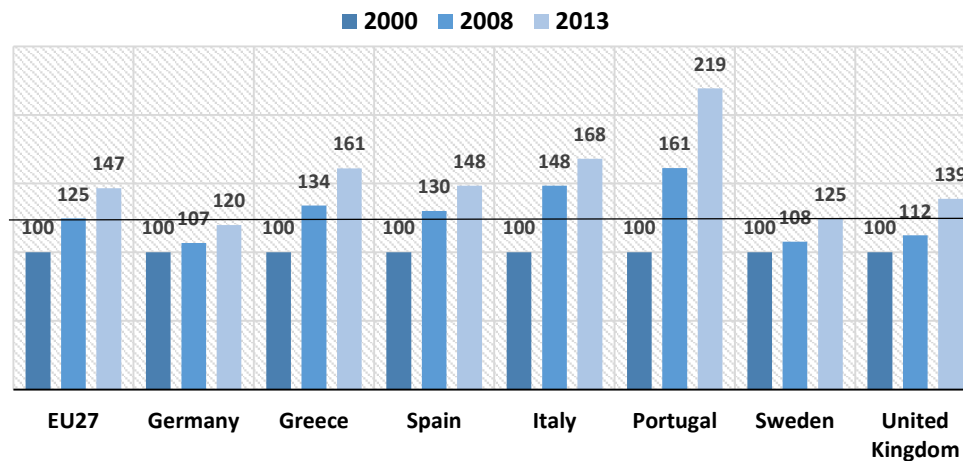
In general terms, the educational policies in Southern European countries were mainly of two types and within two phases: first, by extending the schooling attendance and attainment as well as the mass access to education; secondly, by controlling the success, the educational results and the equity levels. Nevertheless, the two phases occurred distinctively within southern European countries, with differences registered in timing, type of policies and educational priorities. When considering the regularities, in terms of policies and context, we can resume: the focusing on major educational policies – compulsory school and promoting the mass access to schools; augmenting the population's attainment and qualification; solving the Early School Leaving problem; developing the vocational streams and diversification of educational paths. One similar trend can be observed and it corresponds to the already mentioned process of convergence. Convergence is, in fact, a transversal trait among all European countries, although a process registering different rhythms.

The convergence in education was mainly seen in a large scope of educational results, pushing the southern countries to the Europeans standards in education. This can be observed with the significant drop on early school leaving rates in last years; the last results on PISA; with the better schooling rates; the diversification of the channels of access to education and to the tertiary system, among other factors.

5.2 Convergence and Southern European's countries educational results

Starting with lower economic levels of development, Southern European countries were able to promote intense processes of transformation in several sectors – social, economics, family structures, policy-making, among others, - which reflects the initial aiming and the imperative of “being European” and the convergence facing other older EU members in several key economic and social indicators (Capucha, 2014), in which we also include the Education. We can analyze this perspective by comparing Southern European countries, and their efforts taken in the educational field, with France, England, Germany, Sweden, and using four areas/indicators chosen by the level of importance in terms of national policies but also at the European context – Tertiary levels of attainment; rates of students at the vocational areas; PISA results (only math); and the Lifelong- Learning. And once the convergence of the results is our major point, some of these indicators are expressed within a 100 index at 2000 (in some cases earlier) to better grasp the efforts and the proximities.

Figure 5.1 Population with Tertiary attainment (25-64 years old), Index 100=2000

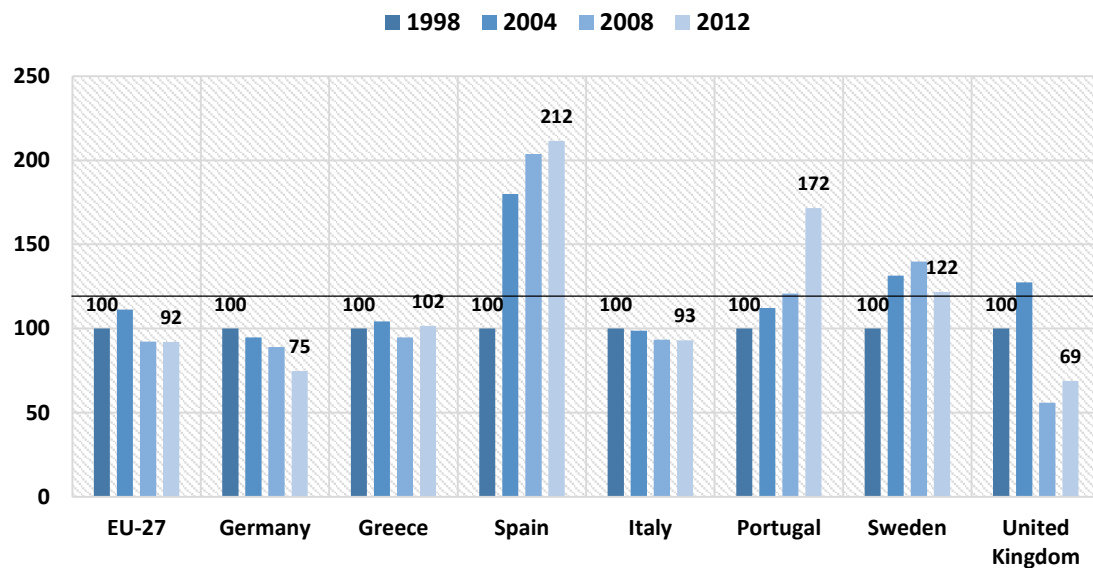


Source: Eurostat

An index base formulation shows that southern European countries had an evolution along with the other countries in the figure, and in some cases, presenting a higher tendency of growth than that one observed in Sweden, Germany and the UK. Portugal raised its graduate's rate by 10.5 percentage points; Greece, 10.4 pp, 11 p.p. in Spain and Italy by 6.6 pp. Greece and Spain have both similar figures and over the EU average (28.6 in 2013, rising 9.1 pp).

The indicator of Vocational and Training Education (expressed in numbers of students on ISCED 3, within the vocational pathways), as we earlier observed, had an upward trend, more evident in some cases such as Italy or Spain. But we can also conclude, that this was, in fact, one of the areas where southern European countries had shown a more significant growth and development. When we analyze the figure reporting the index 100 = 1998, in which we included other European member states, once again we confirmed the trend of a similar evolution to what it is observed in other European countries (Nordic and central countries). See for instance, Spain and Portugal (mainly after 2008) leading in terms of numbers and evolution.

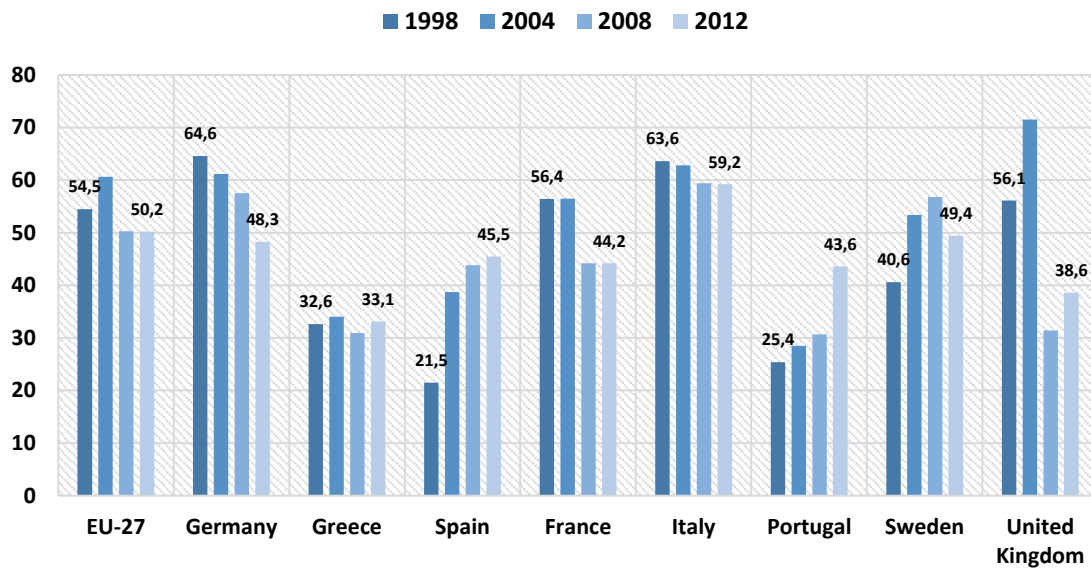
Figure 5.2 Students within the vocational areas as a percentage of the total of students ISCED 3) Index= 1998



Source: Eurostat

The relative numbers (figure 5.3) are showing, precisely, the evolution and the increase of the southern countries' and the decline of other European countries, in terms of vocational and training courses attendance: in Germany, the indicator drops 16.3 pp (presenting a rate of 48.3% in 2012); at 2012, Sweden remains with the same rate presented at 2000 (49.4%) and England decreases 28 p.p., with a rate (38.6% in 2012), lower than in Spain, Portugal (it should be noted the very rapid rise only after 2008), and Italy.

Figure 5.3 Students within the vocational areas as a percentage of the total of students ISCED 3) Index= 1998



Source: Eurostat

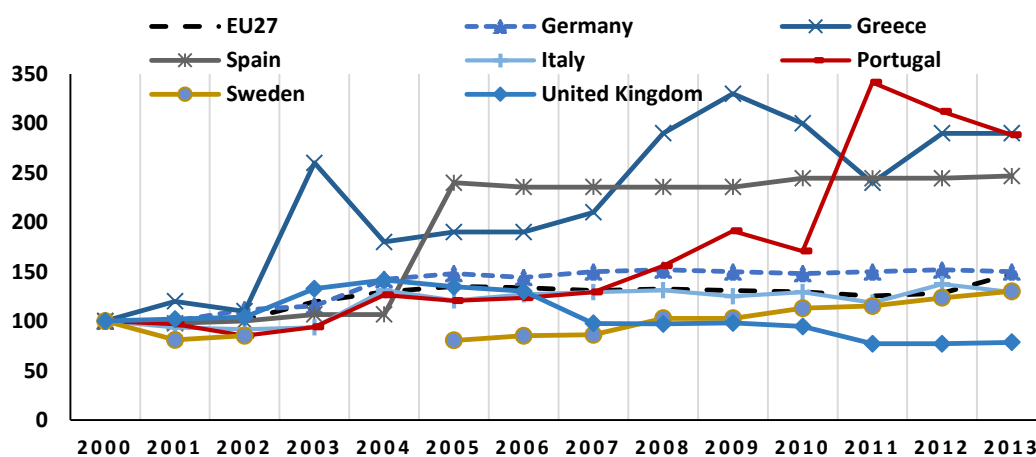
Using the PISA results (only the general ones to the mathematics scale), the same conclusion is underlined: the positive evolution of the southern countries and the decline of other countries, formerly considered “at the top” of PISA’s results. PISA is here used as an important indicator of educational results and of the quality of educational systems.

The cases of Portugal and Italy, particularly, demonstrate significant progressions (Portugal rises 33 points, with a score of 487, and Italy 28 points, with a score of 485) approaching the OECD the average level of the score of 494. What can be concluded is that the three countries of Southern Europe (except Greece) are almost in a "countercyclical" trend, since they do not follow the general decreasing tendency (except the cases of Germany) in these results, as noted in Greece, the UK, and Sweden.

Finally, the last indicator, Adults Education, or specifically the actions of training of Life-long learning, is within one of the most important areas at the European context since the Lisbon Agenda. We previous analyzed – equity section - the differences among the southern countries, particularly, in terms of policies and policy making and choices. Portugal were the country where it was found a more consistent plan – although interrupted in last years with the government change - as others countries, like Italy or Greece, reveal incipient policies. Spain and Portugal, with highest results in this specific indicator.

To put in evidence the comparison with the other four European countries so far used to complement the analysis, we verify that the northern countries stand out with the highest participation rates (Sweden 28.1% and 31.5%), over the EU’s average (10.5%), along with the UK with a 20.5% (although it has fallen 4.4 percentage points in the considered period). Germany performs with rates closer and even below those registered in the Southern Europe (7.8% in 2013).

Figure 5.5 Participation rate in education and training (last 4 weeks), % total population aged 25-64, Index=2000



Source: Eurostat

Despite the significance of these data, the index 100 for 2000 demonstrates the real effort of southern European countries, placing them not so far of the trend observed in the northern states of Europe. The countries with lowest rates in this indicator are also those where the progression was more significant (for instance in Greece).

*

We sustain that an aggregator label such as “southern Europe” has, in fact, little resemblance to the reality of these societies, or to their education and training systems and their educational performance. Regardless of sharing a path of convergence, which has led them to catch up with the international/European standards, the ways and the dynamics in which each country had developed this trail are different. Further, the analysis of quantitative and qualitative indicators, not only in education, but mainly considering the major areas of social and economic indicators (GDP; hours per work; salaries; inequalities) allow us to verify that this exercise of labeling these countries in a single indistinct reality or concepts, have been driven to the legitimation of a single austerity agenda, internationally prepared for these countries. As well as strengthening the international discourse of southern European countries seen as the “PIGS”; the lazy ones; countries living beyond their own capacity. (Capucha, 2014).

5.3 Political cycles and educational policy-making

When considering the main differences in terms of educational results, they are basically seen in: 1. schooling dynamics – an higher performance of Greece and Spain in general’s population qualification (higher tertiary attainment’s rates) on one hand, or the case of Portugal still presenting for 2013 great shares of population with only the basic education attainment, on the other hand; and 2. on the specificities of educational policy: in case of Portugal, for instance, underlining the importance of Adults Education and the Special Education; Greece’s major focus on academic streams, and less selective measures within the compulsory education; Italy’s focusing on the vocational sector; Spain with an educational policy much divide in cause of the regional division.

The analysis of these differences can also carries us to the political setting of these countries, using the considered diachronic period. Countries’ political framework had

passed for several changes in last years and despite their own specific dynamics, there were some regular tendencies:

- 1- The prevalence of left wing governments until 2008, year where the crisis had started;
- 2- The changing to more conservative governments, (right wing parties) since 2008 (and on contrary Italy with a different trend); the implementation of austerity measures; several changes and developments on education policy-domain.

Figure 5.6 Southern European Constitutional Governments between 2000 and 2014



The figure 5.6 shows the several constitutional governments in southern European countries within the period 2000-2013/4. Considering the specific changes, some ideas can be resumed:

- In all cases, the governments alternate between two “types” of parties revealing a “dual” or “dialectic” dynamic both in the elector sphere and in the governance status – on one

side, parties linked with an “socialist” or “social democrat” ideology (in Portugal PS; Spain: PSOE; Italy: Democratic Party; Greece: PASOK;) on the other side, parties linked with a more conservative and popular expression (Portugal: PSD; Spain: PP; Italy: PF; Greece: ND.)

- Except for Italy (and more recently Greece), the tendency observed were to change to a more conservative governments represented by right wing parties our coalitions. This had followed the same trend observed in the majority of the European context.
- Spain is the southern country with an higher level of stability: only three constitutional governments since 2000.
- Greece had a more “blurred” political context (which has culminated in 2014 with the election of SYRIZA an extremist left-wing party). Nevertheless, at the time of implementation of the Troika plan in 2010, the elections put the Democratic Party on the line of command.
- In Portugal, Troika’s arrived at 2011 promoted by the center left-party (PS) but it was later applied by the subsequent government, a right wing coalition government; it is important to underline that no substantial changes in the educational plan were announced on the Memorandum, addressing only an order of cuts. Nevertheless several discontinuities were marked and setbacks.

The next figure (5.7) follows the same diachronic logic and resumes the educational policy within certain periods, which we have called “political-cycles”. This concept, which does not represents the same as Ball’s political-cycles (Ball, 1994) systematized the information, or the main educational policies, by blocs of years (or small periods) that assuming a level of continuity between them. Within national political context, it gives an overview on educational policy-making and its evolution (focused on educational measures of access, success, educational compensation measures) and on the trajectory of educational policy, highlighting the entry in the crisis, the Troika’s intervention (Greece / Portugal) or the political “packages” of measures associated with the crisis (Spain / Italy).

In this part we are trying to answer and analyses the hypothesis within our exploratory problematic: which factor have had more importance/impacts in educational policies and

in policy-making changes? Crisis for itself, or ideology¹⁷ driven by the governments? Considering the Educational policies over the years, we observed continuities, or clear ruptures?

Figure 5.7 Southern European Political Cycles – Policies in Education

	2000 (Lisbon Strategy)	2005	2010 (2020 Strategy)	2013
Portugal	2000-2004 Policies on: Increasing school attendance and attainment; Discussion on: increasing compulsory school; school autonomy; and public schools offers.	2005-2010 Policies on: Increasing of the compulsory education to 12 years of schooling; decreasing in early school dropouts; reinforcement of adults' education and training options and adult's educational attainment; and the development of the vocational and training courses.	2011- ... Policies on: expansion of the students' external assessment at the final of each cycle; introducing "curricular goals"; introducing an earlier tracking (at age 13) with the new Vocational Courses; the disappearance, or restructuring, of some school success measures; ending and reducing the adult's education and training options. Cuts on educational expenditure.	
Spain	2000-2004 Policies on: increasing the quality of the education system; separating, at the lower Secondary level, the vocational tracks from the academic ones; discussion on: equity; students with special needs; sstrengthening vocational options.	2005-2011: Policies on: increasing the quality of the education system; ending the "segregation" on lower secondary, between vocational students and academic studens; facilitating the transition between cycles; discussion on: private and private/public funding on schools and education and catholic schools regulation.	2011- ... Policies on: earlier tracking toward vocational areas; increasing the external assessment moments; Discussion on: centered educational policy versus regional educational policy; autonomy. Cuts on educational expenditure.	
Italy	2000-01 Extending the compulsory education to 9 years; reinforcement of the vocational areas (regionally controlled) and synergies within the labour market; focusing on national's and regional's powers within the vocational and training courses.	2003-08 Policies on: simplifying the upper secondary stage, reducing curricular options and school hours of work; implementing the Bologna directives; promoting the privatization of universities and several cuts on public offers; abolishing the compulsory school of 9 years.	2008-2014: Continuity on the same policy-making path, although with budgetary restrain. Resistant problems: a non-ended decentralization; inequalities between schools and school results; north and south of the country. Currently compulsory school, which remains a significant "ideological" matter in Italy, stands for 12 years (regular or vocational)	
Greece	2000-2009: A stage marked by improvements and expansion at all levels of education, with policies targeting school drop-out; quality of technical and vocational education; tertiary exams; adults education and special Needs options.		2009-2014: three main strategies characterized this period: extensive budgetary cuts – specially on public funding; schools being closed (1500) and cycles being merged into the same infrastructures providers; extensive lay-offs of administration and education personnel; salaries cuts; and reforms. The educational system became more aligned with markets demands, being more difficult to achieved the tertiary public system.	

Education is permeable to the ideological framework of the political forces that constitutes the governments. Therefore, political choices and the managing plan reveals the ideological predispositions and the “educational agendas” that possible differed in some areas or priorities.

We must underlined two important ideas:

- 1- Some “continuity” lines - within the main educational political lines- , are identified in all countries: the development and extension of the compulsory education and the introduction and reinforcement of the vocational are some examples;

¹⁷ Ideology here follows the main conception of Weber as in a system of values, interpretations, and visions reproduced by the individuals and the party structures.

- 2- The particular context of an economic crisis, also brought “extremists” actions at the financial domain (in part necessary) mainly seen in the mass dismissal of teachers; salaries cuts; or by the interruptions of some educational programmes.

One tendency is identify in all four national studies/reports: the assumption that “austerity” was quite responsible for the increase of the levels of southern educational systems selectivity due, in fact, to some of the measures that have been implemented based on expenditures’ cuts and a progression on privatization ever since 2008: - more limited educational access, particularly for some populations, in the case of Portugal seen with the adult’s population; Italy, with levels of inequality, observed with the immigrant’s populations scholar results, as it was several times reported on their work, but also in Portugal and Greece; - the promotion of the “autonomy” - with all the vicissitudes that are liable in this subject -, even If a strong centralization of the educational national measures remains persistence in the majority of the contexts; promoting the “dual” system, distinguishing strongly the vocational training pathways from the regular educational ones ; the implementation of more external selective tests and evaluations moments - fortified in Portugal and Spain; curriculum’s changes and restructuring of the human resources; closing schools; increasing the privatization, particularly in higher education (as last OCDE’s EAT reports, 2015).

One general conclusion was already explored and referrers to the progressive achievement of the European standards and the positive educational performance. Southern European countries had line up their political strategies with what was being promoted through Lisbon Agenda, and more recently, towards the 2020’ objectives. All countries reported that, despite the positive results achieved over the years, some sense of 'neoliberalisation' and selectivity was perceived in some policies and political choices. Firstly, seen with different governments and their different educational agendas; and secondly, after the onset crisis, with the several cuts or with the interruptions of some policies’s lines, as it was already been said. But in which countries we saw more clearly the ruptures, or on contrary, the continuities?

Political Cycles and overview:

Portugal is clearly the one where we observe a more obvious “ideological rupture” – Continuity is stronger in the first two cycles (from 2000 to 2010) where policies searched for the expansion of schooling; bettering the success; modernization of school facilities, among others.

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 (recently interrupted); and the development of the vocational and training courses.

Entering in the crisis period, and with the election the right-wing party, 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 the end of each cycle and on the gradual depreciation of competences in the learning processes. (Portuguese Report)

Greece has essentially two cycles (2000-2009; 2009-2014) although with some level of continuity. But we also can notice “ruptures” and clearly measures of “adaption” to times of crisis. 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, as it is reported. At the second cycle, the budgetary "containment" and the cuts are closely related to the crisis and less to ideological political choices. Nevertheless, in terms of equity, it is stated that the package of measures created more difficulties in public education’s access, deepen differences among the student’s population; the undeveloped adult’s education,

and special education with no data access. Further measures on higher education and privatization mechanisms, have prevented many from reaching the top level of education.

One could argue that the years before the crisis (meaning before 2008) 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. 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.

It is reported that long standing problems in education are not dealt with in a forward manner. These problems are related to equality of opportunity in Greece. After the crisis, the situation for minorities, migrants, pupils coming from disadvantaged families, adults, and students with disabilities has worsened. 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. As it is reported, 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 academic education to an education oriented to acquiring skills in order to continuously feed and sustain a person's so-called employability. (Greek Report)

Italy has a general problem at the core of Educational policies, once it is reported that it works on discontinuous form, driving a fragmented educational national policy. Therefore, political-cycles are not properly differentiated, at least with regard to ideological terms, where we can identify some issues that motivate different positions, such as the compulsory education. However, the "neoliberalization" form of the education system, it is carried out in a continuity line. Inequalities remained at the same focus - between north and south; immigrant population; and more evident among schools within schools.

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.

Four main reforms are identify and 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 years 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 principle¹⁸. In 1997 the Berlinguer Reform raised the *obligation of schooling* from eight to nine years (and from 14 to 15 years old 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

¹⁸ See the comment *The Education Warfare (1994-2010)* at:
<http://strugglesinitaly.wordpress.com/reappropriation/en-the-education-warfare-1994-2010>.

result is a fragmented policy landscape and ever-increasing inequalities in the welfare system (Bifulco, Bricocoli, Monteleone, 2008). (Italian Report)

Spain. In 2002, and with only the support of the three parliamentary Canary Coalition, the PP (right-wing) passed an education law (Organic Law on Quality of Education -LOCE) that, without altering the structure of the education system, introduced the convenience of separating the lower fourth quarter of students vocationally oriented training to go to the academic training-the baccalaureate school. In 2006 a new law (Organic Law of Education -LOE) was approved on the command of a left-wing party PSOE, which abolished the segregation of the final year of lower secondary was approved. The year 2011 brought again a right-wing party which in 2012 had passed the new and recent Organic Law on Education Improvement -LOMCE- This law again divided into the last year of high school at professionally oriented students or academics. Already in the penultimate Mathematics course there are practical and academic mathematics. Moreover, there will be external testing in third and sixth grade and for both the title and the lower secondary school will require approval of an external test developed by the Ministry of Education.

Spain has a clear “reformist” trend, seen in both parties and governments, and regarding some particular subjects, presenting discontinuity lines - particularly, there are different positions within the "tracking" to the vocational and the importance of vocational courses. Like is observed in Portugal, recent measures implemented by Rajoy's party promoted the multiplication of external evaluation and selectivity exams.

The newest reform of 2012/2013 is still in a process of implementation and corresponds to the main subject at this time. 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:

1) 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.

2) 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).

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

4) 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).

5) 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). (Spanish Report)

National specifics and political cycles

Broadly speaking, there are at least two periods marking all countries' cycles under this analyses: a first one comprising the years 2000 until the outbreak of the crisis, or the introduction of the austerity; a second period, corresponds largely to a pre-crisis period and within a massive political change – meaning the shifting to the right-wing and more conservative agendas in governments and in Education – as well as the major financial depression which has also strongly affected the Education policy domain.

Any of these two periods have regularities and inflections in Southern European. For instance: the first period 2000-2011, which largely corresponds to a combination of expansionist cycles on education's results and performance and on the modernization of educational systems and the public school, was most visible within the policies in Portugal, Greece, and even Spain. Italy stands out as having a line of right-wing governments while the other countries had left central governments. In Italian case, the aforementioned educational policy, even if it was marked by discontinuity levels, had

contribute since the 90s to an educational system based on the "duality" and "selectivity" of the system.

Within this first period some themes were more fracturing - as it occurred with the “compulsory education” debate in Italy; or the vocational paths in Spain -, others highlighted the potential of an equity agenda in education, as perceived in Portugal with the development of a consistent Adult’s education policy, the development of the concept of “Inclusive Education”, among others.

The second period is coincident with the crisis’s peak, from 2011 forward (in some cases, changes were seen since 2009). It is not a surprise that this period breaks with the initial phase of a structured educational modernization and schooling expansion.

Within this period “ruptures” were mostly seen in the case of Portugal. In fact, Portugal stands out in this analyses as the country with a most consistent argumentation of “rupture” in its political agenda and rather on the direct effects of the financial crisis. This may bring us back to the potential of using a “narrative” of the impacts of the crisis – the austerity - to change the main core of an educational agenda, expecting that these political changes also reproduces changes among actors and institutions. The Italian case, a clear “rupture” is also observed but instead of testifying a backwardness in equity they started to rebuild education policy within the development of several main strategies considering the purpose of equity: a more clear adult’s education policies domain; a more clear attention to the special education, are some examples to be reported.

To better analyze the main policies, themes, results and changes, before and after the crisis, we summarize the major tendencies and policies in the next figures (5.8 and 5.9). This allows to fully understand how southern European countries are different and have their own specificities in terms of policy-making, as well as the impacts of the crisis in their roll of political choices; or, crisis as a line of argumentation toward the political choices and changes.

In all cases, changes and differences can be perceived along with the same progressive educational results. Considering the previous political-cycles, analyses, and again, the specificities of each country, we can underline some important findings:

- 1- Crisis had a clear impact on educational policies, mainly seen on cuts in levels of expenditure; rising the families's costs on education and levels of expenditure (as it was analyze in the previous chapter) dismissal of teachers; freezing teachers 'careers; closing schools, or restructuring school's facilities; interrupting educational programmes. This was observed in all four countries.
- 2- Trends of educational "reforms"— as it was seen in cases of Spain and Italy. Even if a "reformist" trend is perceived within the narrative of the crisis and the need of a severe level of austerity.
- 3- Despite the convergence, each country had their own specificities and educational priorities.
- 4- Ruptures were observed in all cases, but evident in the case of Portugal and, in a 'countercyclical' path in Italy, mostly because the earlier tendencies of a more equitable agenda seen in Portugal, for example, before 2011, are, in fact, detected in Italy after 2009 and still in a progressive development until 2014 – with a development of educational agendas concerning "adults education" improvement, or Special Need education.

Figure 5.8 Southern European main policies and results

Portugal	Spain	Italy	Greece
<ul style="list-style-type: none"> •Compulsory school 12 years (age 18) •Lowest qualifications •Before 2011 policies on: <ul style="list-style-type: none"> •Adults education •Special Need Education •Increasing the levels of success •Increasing the families support •<u>After 2011:</u> <ul style="list-style-type: none"> •Recent Early tracking – at age 13 •Ending adults' educational options •Decreasing on special needed students signaled and teachers •Cuts in all levels of expenditure •More examss 	<ul style="list-style-type: none"> •Compulsory school 10 years (age 16) •More tertiary attainment • More adults involved in education options (10,8%) •Higher rates on retention •Expenditure on education rose in all levels •More students on private schools •<u>After 2011:</u> <ul style="list-style-type: none"> •More exams and external assessments •Promotion of "dualization" 	<ul style="list-style-type: none"> •Compulsory school 10 years (age 16) •More students on vocational tracks •Territorialization on educational measures •Number of adults in education and training rise to 6,4 at 2012; •No specific policy toward Adults Education; •Rising the levels of privatization •<u>After 2009</u> <ul style="list-style-type: none"> •Decreasing in educational expenditure; rise in students expenditure; rise in school aiding •Rise in students with special needs •Recent policies on an "Inclusive Agenda" 	<ul style="list-style-type: none"> •Compulsory school 10 years (age 15) • Less selectivity until the upper secondary •More students on academic track •Qualification structure closer to the EU27 •The lowest number of adults involved in education and training (2,9% at 2012) •Weaker policies toward Adults Education •Weaker policies toward Special Education •<u>After 2009:</u> <ul style="list-style-type: none"> •Decreasing in all levels of educational expenditure •Teachers dismissal; closing schools; salaries cuts

Figure 5.9 – Diachronic Analyses - Southern European educational results

	2000	2005	2010	2012/2013
Portugal	Left Wing Vocational – 7% Adults – 3,4 % Pre-Primary – 80,7%	Left Wing Vocational – 31% Adults – 4,1% Pre-Primary – 86,3% Developing Inclusive Agenda Bellow ISCED 3 – 73,5%	Left Wing Vocational – 38,8% Adults – 5,8% % Pre-Primary – 94,1% +Adults education policies	Right Wing Vocational – 43,6% / Early tracking(age 13) Adults – 9,9% (10,6% at 2012) Pre-Primary – 97,9% Bellow ISCED 3 – 62,4 Ending “AE” options Decreasing on Special Education
Spain	Right Wing Vocational – 33,5% Adults – 4,5 % Pre-Primary – 100%	Left Wing Vocational – 42,6% Adults – 10,5% Pre-Primary – 99,5% Bellow ISCED 3 – 47,4%	Left Wing Vocational – 44,6% Adults – 10,8% % Pre-Primary – 98%	Right Wing Vocational – 45,5% Adults – 10,8 % Pre-Primary – 97,6% Bellow ISCED 3 – 45,6% Early tracking (age 15) Expansion of exams
Italy	Right Wing Vocational – 24,6% Adults – 4,8 % Pre-Primary – 100%	Right Wing /Coalition Vocational – 61,5% Adults – 5,8 % Pre-Primary – 94,3% Bellow ISCED 3 – 49,6%	Right Wing Vocational – 60% Adults – 6,2 % Pre-Primary – 91,5%	Right Wing Adults – 6,4 % Pre-Primary – 90% Bellow ISCED 3 – 42,8% Developing Inclusive Agenda
Greece	Left Wing Vocational – 32,1% Adults – 1,1 % Pre-Primary – 81,7%	Right Wing Vocational – 36% Adults – 1,9 % Pre-Primary – 75,5% Bellow ISCED 3 – 40%	Left wing Vocational – 30,7% Adults – 3,3 % Pre-Primary – 94,7%	Right Wing Vocational – 31,7% Adults – 2,9 % Pre-Primary – 95,6% Bellow ISCED 3 -34,3% Several cuts

Diachronic analysis (2000-2012/2013)

Despite the ideological nature of the governments some educational subjects are in fact common in all countries: the importance and the increasing of the vocational paths and the numbers of students attending these options; the importance of the development of the pre-primary education, as well as, the importance of maintaining and increasing the compulsory schooling. Vocational had an increase in all countries, particularly in Portugal and Spain, being a less expressive reality in Greece; Pre-primary, also had a positive evolution. These are, in fact, areas transversal to ideologies and governments.

Nevertheless, some topics are more sensitive to the ideological purposes and follows different educational agendas. As it was already been said, the compulsory schooling also constitutes a more fracturing matter due to the discussion of the limit of the legal age

comprised by this measure - as it was reported in Italy and in Portugal. The increase to the age of 18 in Portugal, as the legal limit on compulsory education, as well as the last maximum increase for 16 years in Italy, were both promoted by left-wing governments and questioned by the opposite political forces at the time. And this leads us to another central one, regarding the "tracking" and the vocational options. According to international recommendations (OECD), delaying the vocational path options – meaning after the conclusion of the Basic education - increases the levels of equity and scholar success (OCDE, 2012). In Portugal, the recent introduction of the Vocational Training Courses within the Basic Education (ISCED2) - promoted by the last right-wing government, - had subverted the principles of the Portuguese's Law of Bases of Education and a unified and equal education for all up until the 9th grade. The same trend has been observed also in Spain and in both cases, was accompanied by an increase in the number of external exams at the end of every educational cycle. Increasing "selective" moments within education systems is not a practice directly linked with the improvement of the academic achievement level (Ref). Rather is a source of major stress for students and teachers, and compelling to a learning paradigm based on a metric and less with the pedagogical component and the skills acquired. In fact, the two Iberian countries are representative of major levels of school failure and retention, still with little effective response.

Other subjects revealed to be more problematic and pressing when considering equity, such as Adult Education, or Special Education.

In both cases, Portugal was the country where a 'rupture' was more evident. Between 2007 and 2010, Portugal had a substantial growth in adults' enrolment and certificates in training and education activities (both in basic and secondary education, as it was described in the previous section) under an innovative policy and national program called New Opportunities Initiative aligned with a left-wing government. In 2011, the right-wing government at that occasion, went with the interruption of this programme leaving the country with no real options for adult education, which represented a severe reversion in terms of equity and progressive policy. Numbers started to decline and several Adult's Centres were closed.

The same pattern was observed with 'Special Education'. Even though numbers of pupils signaled have continuously increased, there was a substantial decrease in the services

and human resources allocated in this educational area. As well as a regression in the concept of “inclusion”, once the government started to promote ‘special needs schools’ again instead of inclusive agendas in regular schools and classes.

What’s become interesting to verify, using this two particular examples, is that “cuts” were most evident in areas traditionally associated with equity agendas. For this reason, we assume that last political options were clearly following a much more restrict agenda within a conservative ideological logic.

Italy case offers another interpretation. We considered that this country, in terms of its policies and political cycles, is within a ‘counter-cycle’ path when compared with Portugal’s situation. Despite the same crisis impacts - seen with the financial restrain as well - the last center/left-wing government changed the previous tendencies and invested in those same areas that Portugal’s last government decided to reduce, or cut. Educational policies in Italy follows a discontinuity path, mostly marked by several incomplete reforms, but the recent efforts are pointing to an investment and planning in adult’s education policy and in an agenda for inclusion.

This two cases are the most relevant ones following our line of argumentation: a stronger ideological framework that sustains political choices and education agendas with a much greater importance than the economic crisis vicissitudes.

In Spain we observe several changes as well, with an expansion of exams and selectivity, but with a less visible ideological mark within those areas we considered to be determinant to equity in education. In fact, taking in consideration the indicators on table X, this country had increase in Adult’s education for example. In Greece case, the situation lays in another level, since this country never presented a positive performance in either of the areas in analyses. We find in this country a much stronger mark of the economic crisis seen in the several cuts: a stronger dismissal of teachers; schools facilities closed ...

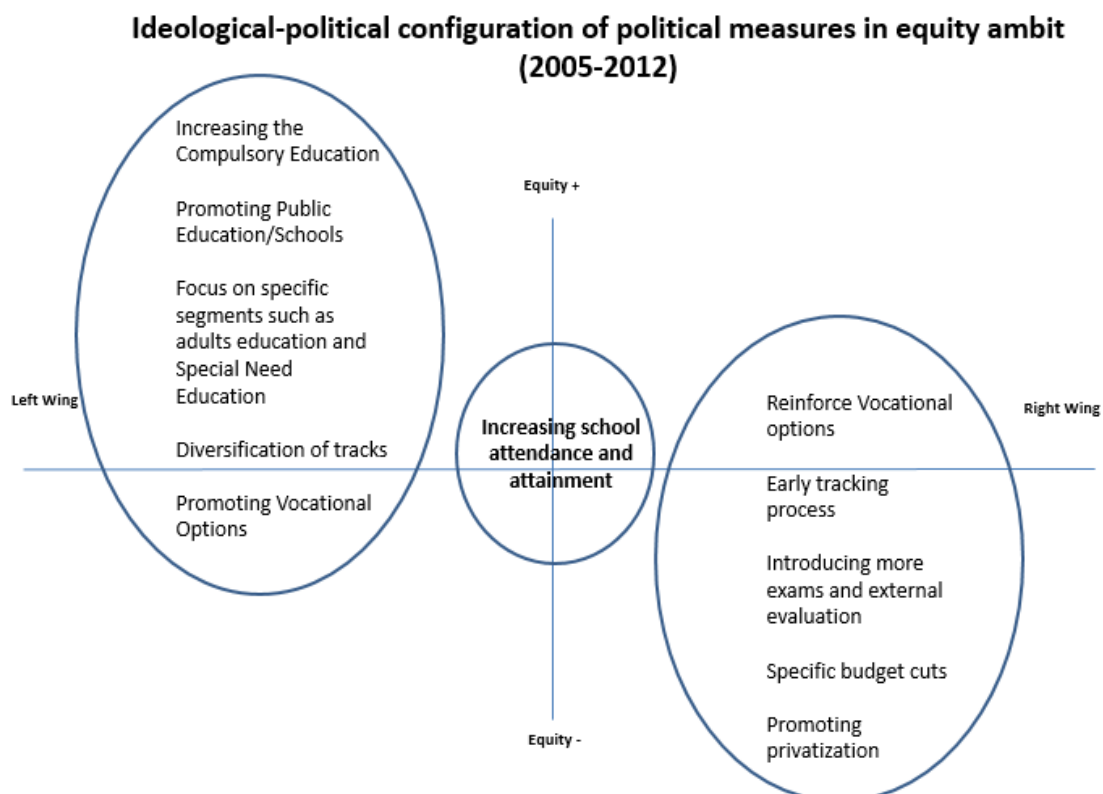
Nevertheless, it is a common trend that one of the most perverse effects of this crisis, is related to the way southern governments implemented their austerity measures, resulting in a poorer management of quality and equity within their education systems. Formally education is considered a priority, but is becoming subordinate to financial solutions, with

the interruption of political lines that aimed the intensification of an agenda towards the promotion of higher levels of equity.

The “ideological” mark and ruptures

“Neoliberalisation” of the educational systems; “selectivity”; “Reforms”; “cuts”, are words clearly marking Southern European’s countries recent trends on educational policies. Crisis effects were seen basically within the financial domain: in all countries, levels of expenditure were adapted to the recession context where we count with the dismissal of teachers; the raising of number of students per class; schools closures; among others.

Despite all countries reporting the crisis effects, one can argue the effect of the ideological mark of the different governments – right-wing and left-wing, - which is resumed in the next figure:



We use “Ideology” within a weberian perspective, as a system of ideals, values and rules. It has a more symbolical nature, formerly reproduced within the political practice of the governments-

The figure organizes the main lines of educational policies in four quadrants: the horizontal axis, locates the ideological nature (left-wing and right-wing) of the parties that support the governments; the vertical axis locates the educational measures according with their ability for promoting equity. Clearly, and according to our analyses and data, left-wing ideology is linked with a most favorable equity promotion: reinforcement of public school; the mobilization of specific segments (adult, special education); equity is seen within a more centered scope. This is seen in Portugal before the crisis (and until 2011) and in Italy, after 2009. On the other hand, right-wing ideology, tendentially had follow a more “closed” conception of equity, supporting the individual choices and with less resources viewed in specific segments of the population inclusion – with a repertoire of policies based on an early, or anticipated division of school trajectories and in selective reinforcement mechanisms. Ideology runs independently of the crisis. Although a context of crisis can potentiated an ideological changed based on “narrative” and the “austerity” management.

The question remains: Crisis or “political ideology” as explanatory variables on political choices? We concluded that were, in fact, a combination of both:

- Specific changes in educational political domain were observed in all four countries – a tendency to “selectivity” linked with right wing parties and policy choices – this was visible in Portugal, or Spain; a tendency to increase in “democratization” – Italy; a severe adaption to the crisis context - Greece.
- Cuts observed in specific educational sectors – adults, Special Need Education (more evident in Portugal) showing that “ideology” were stronger in some countries.
- General cuts on budgetary systems as a way to adapt to crisis impacts.

Conclusion

It takes a certain amount of time, to observe and confirm the main changes, progresses and results from the implemented educational policies, or major educational reforms, in one given country. This is why, the so-called process of convergence in Southern European countries debated throughout this report and related with the achievement of the European standards in educational performance, stands as one main characteristic observe in those countries within our analysis and according to the diachronic period also analyzed. In fact, we can conclude that this is still an ongoing process that could be, more or less, affected by the context of crisis and by political changes. We also can conclude, that some of the comparative indicators (especially concerning the financial, funding and levels of expenditures) were not quite yet expressive of the real impacts from the crisis and the severe context of restrain and austerity reported. Efforts were made by national teams in order to capture the impacts and educational areas most affected, between the years 2000 and 2013/14 by using national information and national sources of data.

Therefore, from this team work and our comparative goal, resulted three levels of impacts: firstly, despite the lack of information from the comparative indicators on finance and educational expenditures, national teams reported severe cuts at the financial domain in education, seen in public expenditure recession, salaries cuts (teachers and educational staff), human resources containment (less teachers; teaches dismissal; less teachers in specific subjects); secondly, the political changes, as the four countries tended to change to more conservative governments within the crisis period, which has had impacts on educational agendas and on a more perceived level of selectivity and “neoliberalization” of educational systems; and finally, a third level of impacts having a more symbolical nature, that came from the ideological mark of some of the political decisions from the governments, which has had more visible impacts in some countries and in their educational agendas and, therefore, on the subject of equity. We had proved that education is permeable to the political context and political decisions, and that this level of permeability can actually overcome the crisis vicissitudes or impositions.

As we said before, our main independent variables in analysis, crisis and ideology, were both visible in our analyses although within different levels of impacts and results. We can summarize some findings:

The convergence toward European patterns: within profound context of globalisation and international “influence” (Lisbon Strategy – boost on educational policies) generic results were achieved: less “Early School leaving” in every country; increasing schooling attainments; increasing the educational offers. These achievements were seen within the diachronic period 2000 – 2013/14, expressing a line of continuity within educational policies and political main decisions. Nevertheless, specific changes at educational political domain were observed in all four countries – a general tendency to increase in “selectivity” linked with right wing parties and its policy choices – most evident in Portugal and Spain; a tendency to increase in “democratization” – in last years, most particular in Italy and its attempting of constructing a more equitable agenda; a severe adaption to the crisis context - in Greece. This means that a context of crisis can contribute to a main political change – meaning adopting right-wing conservative governments as we observed in southern European countries; afterwards, that these same right-wing governments are responsible for the conservative nature within their educational agenda; and that this conservative nature can actually worsen with a severe context of crisis and finance restriction.

The most real and evident crisis impacts - here related with finances, funding and expenditure and “adaption” - were seen in every southern country. In terms of the general expenditure, comparative data points to an increase in every case analyzed, but several other aspects were demonstratives of levels of cuts and regression. This means, that one severe outcome, or risk, from this specific crisis is related with the interruption of the convergence, seen mostly in countries such as Portugal – where a clear interruption on policies and educational measures were observed. Interruption also means compromising equity levels.

A general list of impacts can be delimited from our analyses. After the onset of the crisis education systems were started to be downsized:

- Reducing teachers’ salaries and reducing school staff (lay-offs);
- Less teachers and less teachers assigned in specific areas (Special education in Portugal, for instance); these losses were most evident since 2010/11.
- Closing schools and reshaping schools network (meaning schools buildings/facilities optimisation; creating larger groups of schools within all levels of educational cycles);

- In last years, from 2011 until 2012 (with exceptions on Spain), less students enrolled in the tertiary systems and levels of families expenditures increased considerably, which we considered to be in relation;
- In some countries, financial aid for students and families was slowdown, or less students were signalized;
- Some programmes were interrupted: in Portugal, the interruption of the modernization of school facilities (“Parque Escolar”); in Greece, other programmes considering Special Education or scholar success.
- Increasing the numbers of students per class/teacher (most visible in Italy):

Considering only the political domain, we must underline, that education policy seems to follow on main trend in all southern European countries, which actually goes along with our line of argumentation: levels of discontinuity in policy-making were observe in the period in analysis, and this discontinuity (meaning ending or interrupting political measures adopted from the precedents governments) follows the different options and natures of the governments in last years. We must underline that some subjects and concerning’s were, in fact, similar on both left-wing or right-wing agendas, and here strongly related with the process of convergence: expansion of schooling trends; enlargement of compulsory education; diversification of educational pathways; designing programs for scholar success. In case of other subjects, mostly those related with “equity” and specific segments and educational performance of the system, interruptions were most evident.

One main and general conclusion: crisis has a great impact in education (as it was said) but can actually be worsened according to the ideological framework of the governments. The majority of the countries, within the crisis period had changed to conservative and right-wing parties, and this was observed in some changes and political lines. From the “ideological” mark – once in their majority southern countries had right-wing parties within the advent of the crisis - and the context of crisis, we can stress:

- A sort of “public” dismantled, with the rise of private levels of expenditure as the state expenditures continuously to be reduce;
- Interruption of the convergence, with most evidence in countries such as Portugal – with a clear interruption on policies and educational measures concerning specific segments -

meaning compromising equity levels, once this country had presented cuts in specific educational areas;

- More Selectivity present in several areas: vocational and technological paths are promoting forms of selectivity in countries such as Italy, Portugal or Greece – major presence of some ethnical groups, or social groups, in some courses (Italy and Portugal); or differences in scholar results considering social background, type of school (Italy) or type of course (different results among students within regular academic path versus students in the technological branch, in Greece). These forms of selectivity, or “hidden selection” (Italian Report) are also at the centre of the difficulties in accessing to tertiary system; the expansion of exams into every cycle of education; promoting early tracking;
- Portugal as the country where levels of equity were most compromised: adults and special education recension, as well as promoting an educational system most oriented to "knowledge-based" and less to competencies;
- Italy in a counter-cycle, being a country that despite the great levels of crisis impacts - particularly when it is assumed that levels of inequalities had grown – started to invest in more equitable agendas, promoting changes and progresses in adults education and in an inclusive agenda.

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