

PORTUGUESE HIGHER EDUCATION STUDENT'S COSTS: TWO LAST DECADES VIEW

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Abstract

Based on the Cost-Sharing theory (Johnstone, 1986, 1991, 1992, 2002, 2003), the research on student costs in higher education (HE) plays an important role in the educational policy, namely concerning the equity in cost distribution among students, the State and stakeholders. This study is focused on the socioeconomic characterization of Portuguese HE students and on the research of the costs these students support, as well as the remaining stakeholders (families, governments/ taxpayers and others), according to Johnstone's cost-sharing theory and mobilized the analysis of the results of three nationwide surveys in the academic years of 1994-1995 (Cabrito, 2000); 2004-2005 (Cerdeira, 2009) and 2010/2011 (Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012) to three higher education's students representative samples (universities and polytechnics, public and private institutions).

The study 1) discusses the contribution of Portuguese higher education students for the HE funding; 2) analyses the findings coming from a nationwide study concerning the student's role on HE funding, in Portugal; 3) places those results in a European perspective.

From the comparison undergone between the data coming from the studies on the higher education costs in Portugal, it can be verified that on the period 1994-2010 there was a change on social strata recruitment to HE. In fact, it is possible to realize that the percentage of students coming from rich strata had increased along the period analyzed, fact that can allow us to question about the equity of the Portuguese HE System. On the other side, the studies also allow to conclude that the affordability of Portuguese HE students is minor than homologous indicators taking into account some of the EU and OECD members.

Key words: accessibility, affordability, financing, HE costs.

Introduction

Higher education (HE) is part of the political agenda of most countries. The main problems concerning to this education level relate particularly to the social background of students enrolled and their living conditions as well as its financing. Sociologists such as Bourdieu & Passeron (1964, 1970) and Bowles & Gintis (1974) call attention to the fact that the

school plays social inequalities, by which higher education will tend to be an education for the elite. On the other hand, Boudon (1973) demonstrates the influence of individual heritage on decision making with strong influence on educational choices. Willis (1977) refers the role that social origin plays on children futures. Bernstein (1996) turns evident the role of the language in students' success. Prost (1992), in turn, although in another political point of view, refers that the democratization of education transfers social inequalities from basic and secondary education to higher education. On the other hand, and bearing in mind the financial difficulties that governments struggling in recent times, the idea that funding for higher education should compete the state, students and families, businesses, philanthropists and other stakeholders is increasing, namely with the Cost-Sharing theory (Johnstone, 1986, 1991, 1992, 2002, 2003) in Europe. This new thinking about funding higher education is something new in European countries once the ideas tied to the Providence State stressed education financing to the State and the taxpayers, through taxation.

In order to understand Portuguese situation concerning the role of the school and education, particularly Higher Education towards the democratization of the country, namely to understand changes occurred on higher education some researches had been realized which aiming to answer to a lot of questions, namely the three following ones: *Who are the Portuguese higher education students? What are the costs of education and life that those students have to endure? and What is their situation in an international context?* The answers to these questions allow assessing the social composition of Portuguese HE students, education accessibility and affordability of the system/ATP (ability to pay) and highlight HE student's situation compared to their counterparts in other EU countries. Thus, repeating the previous studies by Belmiro Gil Cabrito in 1994/1995 (Cabrito, 2002) to a representative sample of university students in higher education, consisting of 2026 students and by Luisa Cerdeira in 2004/2005 (Cerdeira, 2009) to a representative sample of students of university and polytechnic, consisting of 1040 students, in order to know who are Portuguese higher education students and to meet the expenses of the Portuguese students with education, the authors of this article, applied a new questionnaire between May and June 2011, to a representative sample of students in higher education, a total of 1040 questionnaires (Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012).

Methodology of Research

The three researches mentioned above settled down on three samples representative of students in higher education. All samples are stratified by the variables: type of education (public university, public polytechnic institute, private university and private polytechnic institute), course attended, age and gender.

Firstly it has been determined the total number of the students enrolled with at least 2 registrations (otherwise it wouldn't be possible to have data from the students) distributed by the institution frequented, the course chosen, age and gender. After this it has been defined about 20% of the universe. The sample respects for each variable its weight in the universe.

After this, all Portuguese higher education institutions were contacted in order to have permission to go there and administer the questionnaires.

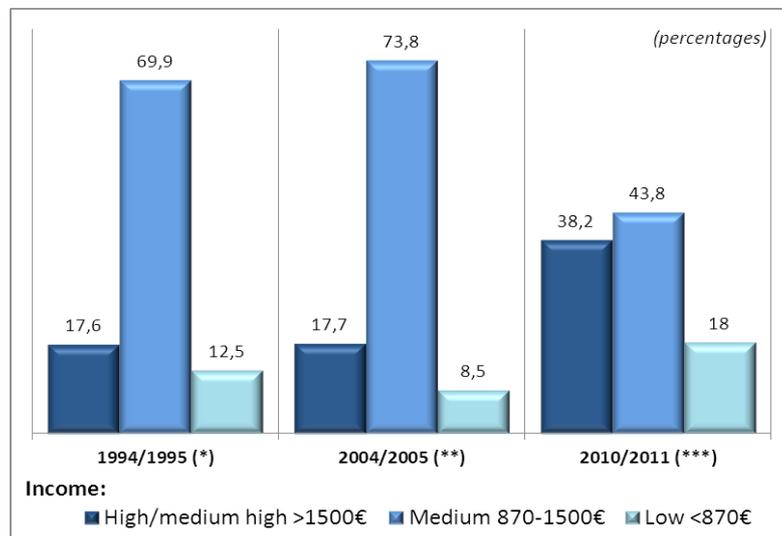
In order to administer the questionnaires, the researchers displaced to each institution. In each institution its "sample" was of random composition. The questionnaires were filled in classes, libraries, or canteens. The questionnaires were always filled in the presence of the researchers.

In order to determine students social and academical background they are asked to indicate academic background of their parents as well as their jobs. On the other hand, to determine higher education costs and their weight in household budgets, and based on Johnstone (1986), respondents were asked to indicate, according Johnstone education costs' typology (1986):

- The income of the household;
 - The annual costs of living (housing, food, telephone, health, transportation and personal expenses such as clothing, footwear, health, leisure, etc.);
 - The annual costs of education (tuition, enrollment, books and teaching materials, didactical equipment, field trips).

Social and Economic Composition of Students in Higher Education in Portugal

In the three empirical studies reported it has been included a set of questions that allow to understand the social structure of Portuguese students in higher education and its evolution. This set of questions concerned the educational attainment level of parents of students, their occupation and income. Based on the analysis of the responses social/wealthy composition of students can be seen in Figure 1.



Source: (*) Cabrito, 2002. (**) Cerdeira, 2009. (***) Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012

Figure 1: Economic background of students in higher education.

Firstly, it should be noted that between 1994/1995 and 2004/2005 there has been an increase of young people from middle class to do higher studies at the expense of young people from disadvantaged strata of society. Simultaneously, the strata High/Medium High continued strongly represented among the student population. These two facts show a strong process of gentrification of higher education in Portugal, after the attempt of democratization of higher education that occurred after the Revolution of April 25, 1974, which ended the dictatorship that dominated the country for almost 50 years. On the other hand, the social structure of students in higher education has changed dramatically between 2004/2005 and 2010/2011. During this period, the participation of students from the wealthiest strata of society has more than doubled, indicating a real process of gentrification of the education system and of the country once the income gap between the poorer and richer Portuguese people is the bigger among EU members. Simultaneously, there has been a spectacular decline of youth participation coming from strata of middle-income students in benefit either richer or poorer students. This situation, which witnesses the downsizing of the medium strata, is the consequence of disruption of an economic nature of the country that launched thousands of individuals belonging to medium income strata

to unemployment (IEFP, several years). Thus, what we really can state is that high and medium high strata is overrepresented in HE students and that higher education is turning more and more with an elite education (Cabrito, 2004; Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012).

So what can be said is that the Portuguese higher education is undergoing a significant decrease in its process of democratization and of building a more equitable system, considering that students of the strata High / medium high reach more than a third of the total number of higher education students.

Costs of Education and Life of Portuguese Students in Higher Education

A significant increase in the costs that HE students must do to be enrolled on HE can be observed between 2004/2005 (Cerdeira, 2009) and 2010/2011 (Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012). Table 1 shows the waste in euros, of the costs of living, cost of education and total costs students in higher education in 2004/2005 and 2010/2011 did and the evolution of total costs in the period, measured in percentage, of total costs.

Table 1. Average total annual costs of higher education students (life, education and total) in euros and growth of total expenditure as a percentage, in the period.

Type of Institution	2004/2005 (*)			2010/2011 (**)			Increase for total costs (%)
	Living costs	Education Costs	Total	Living costs	Education Costs	Total	
Public University	4.297,30	1.207,80	5.505,10	4.679,00	1.263,00	5.942,00	7,9
Public Polytechnic	4.011,70	1.040,20	5.051,90	4.505,00	1.214,00	5.719,00	13,2
Private University	5.048,10	3.660,20	8.708,30	4.618,10	4.225,00	8.843,10	1,5
Private Polytechnic	4.258,20	3.512,00	7.770,20	5.800,00	4.608,00	10.408,00	33,9
Total	4.286,00	1.841,20	6.127,20	4.690,00	1.935,00	6.624,00	8,1

Source: (*) Cerdeira, 2009. (**) Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012

Private education, both university and polytechnic is more expensive than public education for different reasons. However, the most important of those reasons is the value of the fee students must pay in each kind of institution being public ones cheaper than private ones. Nevertheless, from 2004/2005 to 2010/2011 the situation of all students in higher education in general has deteriorated, but the increase of total costs has been more visible in polytechnic education, particularly in the private polytechnic.

Expenditure on Education and Life for Portuguese Students of Higher Education – Accessibility and Affordability: Implementation of Concept

Firstly let's explain the concepts used, the concepts of affordability and accessibility. Accessibility refers specifically to the ability of individuals from any social background have to get the education they want. Consequently, accessibility is strongly linked to issues of equal opportunities, fairness and social stratification as mentioned, among others, Usher & Steele (2006).

Quoting Hill (2003), Usher (2005); Usher (2010), talk about affordability (Ability to pay - ATP) is to affirm the student's ability to pay for their education. In practice, the affordability is related to social, economic and financial conditions of youth and social support provided to

them, since the ability to pay for studies depends crucially on the nature of income sources and amounts.

Many studies on the accessibility and affordability use GDP as the indicator for the possible comparability, given the difficulty in finding information on individual or household income that is capable of international comparison. In fact, GDP and GDP *per capita* indicators have been preferentially used in international economic comparisons, because, on the one hand, cover the entire production produced in a country (though not giving importance to the parallel economy), partly because indicators are easier to determine and common to all countries. The use of GDP *per capita* was then used by Cervenán & Usher (2005) in their study *HE Rankings, Affordability and Accessibility in Comparative Perspective*, conducted under the Educational Policy Institute by Usher & Cervenán in 15 countries.

However, the use of these indicators have been always done with some caution, because, on the one hand, do not include the richness created in parallel production, which in some countries are very close to GDP; on the other hand because they represent average values which are poor indicators particularly in countries with large disparities in income distribution.

Living Conditions of Students in Higher Education

Having made this realization and contextualization of the concepts of accessibility and affordability, we present the living conditions of Portuguese students in higher education. For the analysis that follows we note, however, information of a methodological nature. In the analysis we present, the years taken by reference are not always the same. For most indicators, the values refer to 2010/2011 year to which they relate the data obtained by questionnaire application. However, GDP *per capita* for every country but Portugal is the value for year 2008, once it is the year of reference in the study by Medow & Usher (2010). For Portugal we always use 2010 data, because official data is known as well as students' costs. The use of values for different dates does not invalidate the analyzes on the one hand because of the proximity of the dates, and on the other, because the importance of the analysis lies not so much on the absolute values of different variables, but on their percentage weights in total.

Table 2. Accessibility of Portuguese students in higher education (public and private, university and polytechnic): costs versus-GDP per capita, in Euros, net values, 2010.

	Value €	% GDPpc
(1) GDP per capita	19198,7 (*)	
(2) Education costs	1.934,83	10.1
(3) Life costs	4.689,62	24.4
(4) = (2) + (3) = Total costs	6.624,45	34.5
(5) Scholarship by student ^(a)	425,64	
(6) = (4) -(5) = Net cost	6.198,61	32.3

(7) Net Tax deductions ^(b)	760,00	
(8) = (6) -(7) =Net cost after tax deductions	5.438,61	28.3
(9) Loan by student ^(c)	0,00	
(10) = (4) -(5) -(9) Total Costs (<i>out of pocket</i>)	6.198,61	32.3
(11) = (10)-(7) Total Costs after tax deductions 2010	5.438,61	28.3

Source: Cerdeira, Cabrito, Patrocinio, Machado & Brites, 2012

(*) Corresponding to 25444 USD ppp, the value of *PIB per capita* in 2010, quoted in OECD. Stat, 19/10/2012, with 1 USD ppp. = 0.75455€ according to OANDA Currency calculator Rates tm, access on 31/12/2010.

(a) PORDATA.pt access 22/10/2012

(b) In 2010, the government sets family tax deductions in € 760 per child to study.

(c) The existence of a policy loan to study dates back to 2007/2008 with the Mutual Guarantee Loan that the amounts borrowed in 2010 still did not reach significance values in the real living conditions of students in higher education. Furthermore, there are no official data about public subsidization on loans borrowed to the students.

The analysis of figures in the table is very instructive of the effort that students of higher education and their families need to do to keep studying. In fact, for a family to have an element to study in Portugal need to spend about 34,5% of GDP *per capita*. Studying means expenditure which turns difficult low-income families to make higher education. This explains why in 2007/2008 has been introduced as a policy of social support the Mutual Guarantee Loan. It is a type of mortgage loan offered by six private banks and a public bank, with subsidized interest rates and whose guarantor is the State itself. This initiative follows the policy of awarding scholarships to young people most in need, whose value varies with the level of household income of the student. It is noted that these grants, because of its low value, represent only a tiny contribution to the creation of conditions that ensure accessibility and affordability to higher education in Portugal.

Comparing the Costs of Portuguese Students in Higher Education with those of Some EU and OECD Counterparts

The tables below compare the situation of Portuguese students in higher education to students in some OECD countries, according to Usher & Medow (2010) taking into account the costs that students must do to study and GDP per capita, USD\$, current prices.

The analysis of the data in Table 3 allows you to create four sets of countries: the Scandinavian countries, the countries in continental Europe, the countries of Anglophone influence and the set of countries consisting of Latvia, Japan and Mexico, among which there are no apparent links. When we investigate the situation of Portuguese students we can see that their position is better than New Zeland (9th), England and Wales (10th), Canada (11th), Australia (13th) and USA (14th) is much worse than the European students, in general, and particularly the Scandinavian countries.

Table 3. Comparison of costs of education and GDP pc, USD\$, current prices (*).

	Education costs (1)	GDP pc (2)	%	Ranking
Norway	596	61332	0,97	1 st
Denmark	530	39841	1,3	2 nd
Sweden	600	39613	1,5	3 rd
France	585	34167	1,7	4 th
Germany	933	37115	2,5	5 th
Finland	1.243	38080	3,3	6 th
Netherlands	3.125	42929	7,3	7 th
Portugal	2.564(3)	25444	9,6	8 th
New Zeland	3.118	29077	10,7	9 th
England and Wales	5288	36059	14,7	10 th
Canada	5.974	38985	15,3	11 th
Latvia	3.299	17300 (4)	19,1	12 th
Australia	7.692	38964	19,7	13 th
USA	13.856	46647	29,7	14 th
Japan	11.865	33592	35,3	16 th
Mexico	5.077	15267	32,3	15 th

Source: (1) Usher & Medow, 2010; (2) OECD.Stat 2011, access on 19/10/2012; (3) Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012; (4) CIAWorld Factbook (www.indexmundi.com access on 21/08/2012)

(*) with 1 USDppp. = 0.75455€ according to OANDA Currency calculator Rates tm, access on 31/12/2010

With regard to expenses that students perform to their livelihoods (cost of living expenses), Table 4 clearly shows the terrible situation of Portuguese students among the countries under review, as only Australia and Japan accuse worse. This indicator reveals indisputably the strong tension that are Portuguese students in higher education with regard to weight the cost of living represent the family finances.

However, to better understand the situation of Portuguese students in an international context we see the figures in Table 5 which compares the total costs of education (education + life) in different countries and their relationship with their GDP *per capita*.

Table 4. Comparison between the costs of living and GDP pc, USD\$, current prices (*).

	Living costs (1)	GDP pc (2)	%	Ranking
Norway	7.499	61332	12,2	1 st
Germany	5.317	37115	14,3	2 nd
Netherlands	7.223	42929	16,8	3 rd
Latvia	2.924	17300 (4)	16,9	4 th
Finland	6.734	38080	17,7	5 th
Canada	7.033	38985	18,0	6 th
Mexico	3.032	15267	19,9	7 th
USA	9.759	46467	21,0	8 th
France	7.462	34167	21,8	9 th
Sweden	8.665	39613	21,9	10 th
Denmark	9.413	39841	23,6	11 th
Portugal	6.215 (3)	25444	24,4	12 th
New Zeland	7.552	29077	26,0	13 th
England and Wales	9.556	36059	26,5	14 th
Australia	11.660	38964	29,9	15 th
Japan	12.936	33592	35,5	16 th

Source: (1) Usher & Medow, 2010; (2) OECD.Stat 2011, access on 19/10/2012;

(3) Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012; (4) CIAWorld

Factbook (www.indexmundi.com access on 21/08/2012)

(*) with 1 USDppp. = 0.75455€ according to OANDA Currency calculator Rates tm, access on 31/12/2010

Table 5. Comparison between the total costs of education (education + life) and GDP pc, USD\$, current prices (*).

	Total costs (1)	GDP pc (2)	%	Ranking
Norway	8.096	61332	13,2	1 st
Germany	6.250	37115	16,8	2 nd
Finland	7.977	38080	20,9	3 th
Sweden	9.265	39613	23,3	4 th
France	8.047	34167	23,6	5 th
Denmark	9.443	39841	23,7	6 th
Netherlands	10.348	42929	24,1	7 th
Canada	13.007	38985	33,4	8 th
Portugal	8.779 (3)	25444	34,5	9 th
Latvia	6.223	17300(4)	36,0	10 th
New Zeland	10.670	29077	36,7	11 th

England and Wales	14.844	36059	41,2	12 th
Australia	19.352	38964	46,7	13 th
USA	23.615	46647	50,6	14 th
Mexico	8.108	15267	53,1	15 th
Japan	24.802	33592	73,8	16 th

Source: (1) Usher & Medow, 2010; (2) OECD.Stat 2011, access on 19/10/2112; (3) Cerdeira, Cabrito, Patrocinio, Machado & Brites, 2012; (4) CIAWorld Factbook (www.indexmundi.com access on 21/08/2012)

(*) with 1 USDppp. = 0.75455€ according to OANDA Currency calculator Rates tm, access on 31/12/2010

As might be expected taking into account the expenses that Portuguese students perform either with education itself or with their everyday life, its position in the international context is close to the root of the countries of Anglo-Saxon. It appears that the situation of Portuguese students in relation to its *affordability*, is in 9th place, and behind Anglo-Saxon countries and Japan and Mexico, countries highly competitive and with a great weight of private higher education.

Finally, paying attention to the total expenses of the students/families with their education, after tax deductions and grants received, it can be noticed that the real situation of Portuguese students is also only better than their Anglo-Saxon countries, Japanese and Mexican counterparts (see Table 6).

This last indicator that represents all the costs incurred by higher education students have already been taken into account the grants and tax breaks is one that takes a more global nature. Consequently, we can affirm that among the countries under review, the ranking of Portuguese students in relation to their ability to pay the costs of higher education is the worst revealing a highly inappropriate with regard to a lot of their colleagues.

Table 6. Comparison of the total expenditure of the students received scholarships and the tax deductions, and GDP pc, USD\$, current prices (*).

	Net Costs (1)	GDP pc (2)	%	Ranking
Norway	6.276	61332	10,2	1 st
Denmark	5.229	39841	13,1	2 nd
Finland	5.641	38080	14,8	3 rd
Sweden	6.056	39613	15,3	4 th
Germany	5.821	37115	15,7	5 th
Netherlands	8.111	42929	18,9	6 th
France	7.274	34167	21,3	7 th
Portugal	7208 (3)	25444	28,3	8 th
Canada	11.632	38985	29,8	9 th
Latvia	5.258	17300(4)	30,4	10 th
New Zeland	9.328	29077	32,1	11 th
England and Wales	13.772	36059	38,2	12 th
USA	19.059	46647	40,9	13 th
Australia	17.630	38964	45,2	14 th
Mexico	8.020	15267	52,5	15 th
Japan	24.802	33592	73,8	16 th

Source: (1) Usher & Medow, 2010; (2) OECD.Stat 2011, access on 19/10/2012; (3) Cerdeira, Cabrito, Patrocínio, Machado & Brites, 2012; (4) CIAWorld Factbook (www.indexmundi.com access on 21/08/2012) (*) with 1 USDppp. = 0.75455€ according to OANDA Currency calculator Rates tm, access on 31/12/2010

Thus, being in 8th position, the Portuguese higher education students are in a very disadvantaged situation in the international context, particularly when compared with their most European colleagues.

Conclusions

Among the various indicators calculated the share of expenditure on education for GDP *per capita* shows, for Portuguese students of higher education values close to those encountered in other EU countries. This can be explained by the fact that two thirds of students in higher education in Portugal attending public institutions practicing fees relatively low. However, for other indicators of affordability, which depend fundamentally on the public policies of higher education funding policies of countries and social in nature, the position of the Portuguese students is far below that of his colleagues, particularly the Europeans. This situation is quite the testimony of minor Portuguese governments are giving to higher education.

Indeed, in recent years the policy of financing higher education in Portugal has assumed an ultra-liberal nature which translates into a decrease in the value of scholarships and the number of grantees and tax deductions together with the sharp rise of tuition fees in public schools or either in private education, as well as the price level of goods and services in general. The analysis showed a very unfavorable situation of Portuguese students in higher education with regard to the degree of accessibility and affordability, because that sets up an unfair situation in accessing and staying power of the Portuguese higher education which demonstrates, moreover, the high degree of social injustice of higher education in the country.

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