Higher Education in Portugal

Policies for Access and Success

Higher Education in Portugal

POLICIES FOR ACCESS AND SUCCESS

OECD
BETTER POLICIES FOR BETTER LIVES

This document was produced with the financial assistance of the European Union. The views expressed herein can in no way be taken to reflect the official opinion of the European Union.

Please cite this publication as:
OECD (2025), *Higher Education in Portugal: Policies for Access and Success*, Higher Education, OECD Publishing, Paris, https://doi.org/10.1787/49b1c7dc-en.

ISBN 978-92-64-42732-7 (print)
ISBN 978-92-64-37608-3 (PDF)
ISBN 978-92-64-43441-7 (HTML)

Higher Education
ISSN 2616-9169 (print)
ISSN 2616-9177 (online)

Photo credits: Cover © Harbucks/Shutterstock.com.

Corrigenda to OECD publications may be found at: https://www.oecd.org/en/publications/support/corrigenda.html.

Foreword

Participation in higher education has increased across the OECD in recent years. This has contributed to making the student body in higher education more diverse than in the past, but certain population groups remain under-represented. This under-representation indicates that there are underlying inequities in the education system that raise barriers for certain groups to enrol in and complete higher education programmes.

Improving equity of opportunity to participate in education helps to ensure that individuals with academic potential can access and complete advanced study and is relevant in delivering a highly skilled workforce and important in fostering democratic values. Equity of opportunity in higher education also helps to make efficient use of public and private funds invested in the system as governments seek to stimulate higher innovation and economic growth.

This report offers an assessment of the current policy landscape related to higher education and skills development in Portugal, focusing on access to higher education, including admission to the most selective programmes, and the completion of programmes once students enter higher education. The report identifies recommendations to the government and system stakeholders on how to strengthen the policy framework related to higher education pathways, direct and indirect financial support, career advice and non-financial support for student retention, such as tutoring and mentoring.

The analysis and recommendations contained in the report are underpinned by analysis of the Portuguese higher education system, international examples of policies and practices of relevance to Portugal, and engagement with a wide range of stakeholders. Engagement included a stakeholder survey, focus groups in five regional consultation communities, and interviews with civil servants, public agencies, higher education institutions, school staff and municipal leaders.

The report is an output of the project “Making Higher Education in Portugal More inclusive”, funded by the European Commission through The Technical Support Instrument. It was produced by the OECD in close co-operation with the Portuguese Directorate-General for Higher Education (DGES), the Portuguese Ministry for Education, Science and Innovation (MECI) and previously the Portuguese Ministry for Science, Technology and Higher Education (MCTES), and the Reform and Investment Task Force of the European Commission.

Acknowledgements

This publication is part of the OECD's programme of work on higher education policy. It was prepared by the OECD as part of the project "Making higher education in Portugal more inclusive" and funded by the European Union via the Technical Support Instrument. The project was implemented by the OECD, in co-operation with the Portuguese Directorate-General for Higher Education (DGES), the Portuguese Ministry for Education, Science and Innovation (MECI) and previously the Portuguese Ministry for Science, Technology and Higher Education (MCTES), and the Reform and Investment Task Force of the European Commission.

The project was managed by Maja Gustafsson (Analyst, Higher Education Policy Team) under the guidance of Simon Roy (Team Lead, Higher Education Policy Team). Research support was provided by João Reis (Analyst, Higher Education Policy Team). Editorial and publication support were provided by Christie Morley and Sophie Limoges. Overall guidance was provided by Paulo Santiago (Head of Policy Advice and Implementation Division, OECD Directorate for Education and Skills) and Andreas Schleicher (Director, OECD Directorate for Education and Skills). Members of the OECD's Group of National Experts on Higher Education (GNE-HE) provided feedback on the analytical framework guiding the analysis in this report.

The authors are grateful for the substantive input from the Project Advisory Group: Goreti Faria from the Ministry of Education, Science and Innovation (MECI), Artur Santoalha from the Ministry of Science, Technology and Higher Education (MCTES), Joaquim Mourato, Director General of the Directorate-General of Higher Education (DGES), Ana Mateus, from the Directorate-General of Higher Education (DGES), and Sébastien Combeaud, Senior Expert, Education and training, European Commission's Reform and Investment Task Force (SG REFORM).

The authors are also grateful for the guidance provided by the members of the Extended Advisory Group: Ana Balcão Reis, Professor and Vice-Dean for Pre-experience Studies at the Nova School of Business and Economics, Ângela Dionísio from the National Agency for Qualification and Professional Education (ANQEP), Mónica Maia, Professor at the School of Education at the Polytechnic Institute of Porto, Carla Mota from the Directorate-General of Education (DGE), Tiago Neves, Associate Professor and Director of the Doctoral Programme in Education Sciences at the University of Porto, Ricardo Paes Mamede, Associate Professor and Deputy Director of the Department of Political Economy of ISCTE University Institute of Lisbon, Conceição da Silva Portela, Full Professor and Deputy Director of Católica Porto Business School, and Francisca Simões from the National Agency for Qualification and Professional Education (ANQEP).

The authors would also like to thank the stakeholders who shared their expertise of the Portuguese system with the OECD team as part of the project, as well as respondents to the survey, focus groups and interviews held organised within the scope of the project.

The report also benefited from presentations made by academics and sector stakeholders during two online international peer learning events. One event was held on preferential access and career guidance, with contributions from: Rustamdjan Hakimov, Associate Professor at the University of Lausanne in

Switzerland, Carolien Hueting, Senior Policy Advisor Educational Affairs at the Dutch Council of Secondary Schools, Maria Keplinger, Head of Department in the Austrian Federal Ministry of Education, Science and Research, and Daniel McFarlane, Access Manager at the Irish Universities Association.

The other event was held on using data and predictive models to promote study success in higher education, with contributions from: Carmen Aina, Professor at the Piedmont University in Italy, Maria Krakovsky from the Vienna University of Economics and Business in Austria, Rita Cadima, panel member of the national Programme for Promoting Success and Reducing Drop-out Rates and professor at the Polytechnic Institute of Leiria in Portugal, Karl Ledermüller, professor at the Vienna University of Economics and Business in Austria, Ana Teresa Oliveira, professor at the Polytechnic University of Viana do Castelo in Portugal, Alessandro dal Palù, professor at the Parma University in Italy, Lina Rosálio, professor at the Polytechnic Institute of Leiria in Portugal, and Kerstin Wagner, researcher at the Berliner Hochschule für Technik in Germany.

The detailed student tracking note, which is summarised in Chapter 6, was co-authored by Maja Gustafsson, Analyst, Higher Education Policy Team at the OECD, Simon Roy, Team Lead, Higher Education Policy Team at the OECD, Carmen Aina, professor at Piedmont University in Italy, and Alessandro dal Palù, professor at Parma University in Italy.

While the report draws on data and analysis from the OECD and Portugal as well as information provided by Portuguese stakeholders, any errors or misinterpretations remain the responsibility of the OECD project team.

Table of contents

Foreword 3

Acknowledgements 4

Table of contents 6

Abbreviations and acronyms 11

Executive summary 13

1 A framework for analysing inequities in enrolment and completion of higher education 15

1.1. Introduction and key findings 16
1.2. Why continue to focus on widened participation in higher education? 18
1.3. A broad international consensus on the importance of equity in education has emerged 18
1.3.1. The Social Dimension of the Bologna Process 18
1.3.2. The European Union's European Strategy for Universities 19
1.3.3. The OECD Legal Instruments related to young people and equity in education 20
1.4. Outcome indicators and key factors that are important in understanding equity of opportunity in higher education 21
1.4.1. Three outcome indicators are of key interest when considering the level of equity of opportunity in higher education 21
1.4.2. Key factors that shape opportunities to access and complete higher education 22
1.5. Developing a framework for analysing equity challenges in higher education 29
References 33

2 Current inequities in higher education participation in Portugal 41

2.1. Introduction and key findings 42
2.2. Despite widened access, students from lower-income backgrounds still risk missing out on important educational opportunities in Portugal 43
2.2.1. Current inequalities in access to resources are greater in Portugal than on average in OECD member countries 43
2.2.2. Efforts to widen participation have borne fruit in the past decade 44
2.2.3. Transition to higher education in Portugal is still influenced by parental income 46
2.2.4. Lower-income students are less likely to access the most competitive courses 49
2.3. Access to higher education while remaining in the parental home varies by geographical location 51
2.3.1. Public polytechnics are more geographically dispersed than public universities 51
2.3.2. The level of competition for places differs across geographies 53

2.4. Completion rates in Portugal are relatively strong across income groups 55
2.4.1. Completion rates in Portugal are broadly in line with the average across the OECD member countries 56
2.4.2. Completion rates tend to be higher in more selective programmes in Portugal 57
References 59
Notes 61

3 Prior achievement and admission systems 63
3.1. Introduction and key findings 64
3.2. Disadvantage accumulates over students' life courses and results in systemic differences in secondary education grades 65
3.2.1. Students whose parents have attained higher education are more likely to receive top grades than students whose parents have not 66
3.2.2. Preferential access policies in higher education institutions can help mitigate the effects of inequities in prior achievement on educational opportunities 73
3.3. Students from vocational secondary education programmes who want to transition to higher education face considerable barriers 75
3.3.1. Students from lower socio-economic backgrounds are over-represented in vocational secondary education programmes 76
3.3.2. Special competitions and short-cycle programmes can help provide reliable pathways to higher education 78
References 83
Notes 85

4 Direct and indirect student financial support 87
4.1. Introduction and key findings 88
4.2. Direct and indirect financial student support is important to increase opportunities for students to participate in higher education 89
4.2.1. Portugal offers generous tuition fees subsidies to students enrolled in the public sector 89
4.2.2. Means-tested student grants aim to contribute to living costs for the lowest-income students and cover tuition fees at the minimum level 93
4.2.3. A potential avenue for further development of the study grant is to strengthen the role of financial support for living costs while studying 95
4.2.4. Lower-income mobile students could be eligible for extra direct and indirect housing support 98
4.2.5. Portugal has made important improvements in the support to mobile students, but some challenges remain 99
4.3. The eligibility rules for student grants are complex to operationalise and understand, increasing uncertainty for students 105
4.3.1. The eligibility criteria for support changes in the transition from secondary education to higher education, making predictability challenging 105
4.3.2. The complexity of operationalising the eligibility controls of the lowest-income students means that case management is overly slow and resource intensive 108
4.3.3. The design of the housing supplement rightly attempts to curb informality in the private rented sector, but risks placing the burden of control on vulnerable students 109
4.4. The level of indirect financial support delivered through social support services varies across regions, cities and higher education institutions 111
References 114
Notes 118

5 Access to information and personal motivation 119
5.1. Introduction and key findings 120

5.2. Educational aspirations among students in Portugal are sometimes misaligned with their labour market expectations 121
5.2.1. Considerable educational aspirations gaps exist between students from different socio-economic backgrounds in Portugal 121
5.2.2. Many 15-year-olds have misaligned labour market expectations and educational attainment plans 123
5.3. Most students in Portugal can access career advice in school, but information from social networks tends to vary by socio-economic background 124
5.3.1. Most students can access some career advice through their school in Portugal, but career advisors struggle to fulfil their mission 125
5.3.2. Qualitative evidence suggests that socio-economic background influences student decisions through informal advice 129
5.3.3. Higher education institutions also play a key role in the dissemination of information about opportunities 130
References 134

6 Innovative approaches to non-financial support 137
6.1. Introduction and key findings 138
6.2. Higher education institutions have increasingly provided tutoring and mentoring services to their students to promote completion rates 139
6.2.1. When students drop out of higher education in Portugal, it can be a relatively long time after first enrolling 139
6.2.2. National funding has encouraged institutions to keep investing in initiatives that aim to reduce higher education drop-out 143
6.3. Innovations in using analytical methods to design student support interventions are gaining momentum 147
6.3.1. Institutions and researchers in Portugal have started leveraging detailed data to understand student success 147
6.3.2. Emerging applications of predictive models to promote student success in Portugal 149
6.3.3. Scaling up successful initiatives related to student progress and success in Portugal 150
References 155
Notes 158

Annex A. The TSI project stakeholder Survey 159
Table A.1. Professional roles of TSI project stakeholder survey respondents 159

Annex B. TSI Project focus groups 161
Table B.1. Professional roles of TSI project focus group participants, round 1 162
Table B.2. Professional roles of TSI project focus group participants, round 2 162

FIGURES

Figure 1.1. A stylised framework for analysing equity challenges in higher education 30
Figure 2.1. There are relatively large differences in students' socio-economic status in Portugal 44
Figure 2.2. Higher education attainment rates have increased in Portugal in the past decade 45
Figure 2.3. Lower-income students are less likely than their better-off peers to enrol in higher education in Portugal overall 47
Figure 2.4. Lower-income students are more likely to enrol in polytechnics than higher-income students in Portugal overall 48
Figure 2.5. Fewer lower- than higher-income students make it to the most selective programmes 50
Figure 2.6. Public polytechnics are more dispersed across the country than universities 52
Figure 2.7. There is considerable variation in application patterns across Portugal 54

Figure 2.8. Public higher education study places per local secondary education graduate vary across Portugal 55
Figure 2.9. Completion rates by the end of the theoretical duration plus three years is higher in Portugal than the OECD member country average 56
Figure 2.10. Completion rates tend to be highest in the most selective programmes of excellence in Portugal 57
Figure 2.11. Completion rates tend to be higher for students entering via the general access regime in Portugal 58
Figure 3.1. Almost 1-in-5 students whose parents attained higher education receive top grades 67
Figure 3.2. Lower-income students are less likely to receive extracurricular tutoring 70
Figure 3.3. A majority of students with lower-educated parents take vocational secondary education programmes 76
Figure 3.4. A little over half of the vocational students who transition into higher education enrol in short-cycle CTeSPs 79
Figure 3.5. Nearly half of CTeSP graduates across Portugal transition to a bachelor's programme, although there is considerable variation across institutions 80
Figure 4.1. The Government has kept tuition fees in public institutions low in recent years 90
Figure 4.2. Tuition fees in the private sector are significantly higher than those in the public sector 91
Figure 4.3. Stakeholders report that the cost of living is the most important barrier to studying 93
Figure 4.4. Portuguese authorities have focused on extending the eligibility to the grant to a broader set of lower-income recipients in recent years 94
Figure 4.5. The share of students who are mobile has grown in the past decade 99
Figure 4.6. There will likely remain some unmet need among mobile grant recipients in certain locations even after PNAES 101
Figure 4.7. The housing supplement is significantly higher than observed average private rental costs 104
Figure 4.8. For a family of two parents and two children, students who received ASE A in secondary education might need to attend an interview before receiving the higher education study grant 109
Figure 4.9. Funding for social services differ widely between institutions 112
Figure 5.1. The educational aspirations gap in Portugal is stronger than across OECD member countries 122
Figure 5.2. Socio-economic gaps in career aspirations are roughly in line with the OECD average 123
Figure 5.3. Some students may not realise that their dream job requires a higher education degree 124
Figure 5.4. A little over three in five 15-year-olds report having spoken to their school career advisor 125
Figure 5.5. Students in disadvantaged schools lack formally scheduled time for career advice 126
Figure 5.6. The majority of students search for information about their opportunities online 127
Figure 5.7. Fewer students in Portugal than across OECD member countries have attended organised tours or visited job fairs 131
Figure 6.1. When students drop out in Portugal, it is often a relatively long time after first enrolling 140
Figure 6.2. Most of the variation in completion rate by subject area appears after the first year in Portugal 141
Figure 6.3. Almost one-in-four students in Portugal report feeling like they do not belong in higher education 143

TABLES

Table A.1. Professional roles of TSI project stakeholder survey respondents 159
Table B.1. Professional roles of TSI project focus group participants, round 1 162
Table B.2. Professional roles of TSI project focus group participants, round 2 162

BOXES

Box 1.1. Austria's national strategy on the social dimension of higher education 19
Box 1.2. Social mobility is low where inequality is high 26
Box 2.1. What is School Social Action in Portugal? 49
Box 2.2. The number of available study places is set through a system of *numerus clausus* 51
Box 2.3. Portugal's binary higher education system comprises universities and polytechnic institutes 53
Box 3.1. Setting secondary education grades for students in general study orientations in Portugal 66
Box 3.2. The National Access Competition is the main entry point to higher education 68
Box 3.3. Extracurricular mentoring for secondary education students in France, Wales and Colombia 71
Box 3.4. The Ministry has attempted to reduce grade inflation by strengthening the role of the national exams in determining the final upper secondary education leaving grades in Portugal 73
Box 3.5. A preferential access scheme in Ireland 75

Box 3.6. Alternative pathways to higher education in Australia and Ireland 81
Box 4.1. Lower-income students can benefit from financial support from various sources 91
Box 4.2. Means-tested grant systems in France and Germany 96
Box 4.3. Student loans to help pay for living costs are available in Lithuania, Finland and Canada 97
Box 4.4. Renewed political commitment to increase the stock of student housing 100
Box 4.5. Student housing provision in Finland and Austria 102
Box 4.6. Institutional funding based on the socio-economic profile of students in Ireland and Australia 113
Box 5.1. Tools for career guidance in secondary educations in France and the Netherlands 129
Box 5.2. Community outreach activities in Germany 132
Box 6.1. Programme for Promoting Success and Reducing Drop-out Rates 144
Box 6.2. Evaluating institutional initiatives across the EU and in the United Kingdom 146
Box 6.3. Sharing IT services across institutions in the Netherlands and Ireland 152
Box 6.4. Harmonising data collection and streamlining data access in Ireland, Finland and Lithuania 153

Abbreviations and acronyms

A3ES	Agency for Assessment and Accreditation of Higher Education
ASE	School Social Action
CIPES	Centre for Research in Higher Education Policies
CNE	National Education Council
CNIPES	National Council for Pedagogical Innovation in Higher Education
CTeSP	Professional Higher Technical Course
DGE	Directorate-General for Education
DGEEC	Directorate-General for Statistics of Education and Science
DGES	Directorate-General for Higher Education
DGEstE	Directorate-General for School Establishments
EE	Education Statistics
ENES	Secondary Education National Exams database
ESCS	Economic, Social and Cultural Status index
EU	European Union
FCCN	National Research and Education Network
IAS	Social Support Index
IEFP	Institute for Employment and Vocational Training
ISCED	International Standard Classification of Education
MCTES	Ministry for Science, Technology and Higher Education
MECI	Ministry for Education, Science and Innovation
OECD	Organisation of Economic Co-operation and Development
PISA	Programme for International Student Assessment
PNAES	National Housing Plan for Higher Education
RABEES	Regulation for the Allocation of Scholarships to Higher Education Students
RAIDES	Survey on the Registration of Enrolled and Graduated Higher Education Students
REA	Annual School Census
RRF	Recovery and Resilience Facility

RRP	Recovery and Resilience Plan
SAS	Social Action Services
TEIP	Priority intervention educational territory
TSI	Technical Support Instrument

Executive summary

Wider access to, and success in, higher education contributes to helping young people thrive in a changing labour market. It also allows governments to optimise the use of public funds in building a high-skilled workforce while reinforcing democratic values. A broadly shared international consensus supports the policy aim of promoting equity of opportunity in education, highlighted through the Social Dimension of the Bologna Process, the European Union's European Strategy for Universities and OECD Legal Instruments.

International research identifies at least three key overarching factors that shape opportunities to access and complete higher education: prior achievement, financial support and access to information. This report focuses on analysing inequities in opportunity arising from differences in parental income and socio-economic background in Portugal. Specifically, it considers the opportunities for secondary education students to transition to public higher education immediately following their graduation, and on the opportunities for higher education students who have enrolled in a programme to succeed.

The higher education system in Portugal is in a relatively strong position after years of positive development, but some challenges remain. The country experienced greater increases in higher education attainment for 25-34 year-olds than in other OECD jurisdictions in the past decade, with attainment rising by 12 percentage points between 2014 and 2024, compared with 7 percentage points on average across OECD countries. Even so, lower-income students in Portugal remain less likely than higher-income students to transition into higher education, and also less likely to enrol in the most selective "programmes of excellence". However, lower-income students on average do not have higher drop-out rates than higher-income students when considering students who enrol in similar programmes and via the same entry routes.

Opportunities for further education are crucially influenced by outcomes and achievement at the end of secondary education. The study orientation of secondary education programmes – general versus vocational – is crucial in shaping access to higher education in Portugal, as in many other OECD member countries.

In general programmes, transition rates are high, albeit with some differences across income groups. In 2022/23, 76% of secondary education graduates from general programmes enrolled in a higher education programme in the following year. Although the National Access Competition is well designed to treat applicants objectively, higher-income students remain more likely than lower-income students to enrol in higher education. This reflects systemic differences in entry grades across income groups, likely – in addition to other motivational factors – because higher-income students access more hours of privately provided extra-curricular tutoring and experience greater positive effects of inflated internal subject assessments compared with lower-income students. This raises barriers for lower-income students to achieve similar secondary education leaving grades as higher-income students, at any given academic ability.

By contrast, transition rates for the 2022/23 cohort of graduates from vocational secondary education programmes are relatively low (22%). This disproportionately affects lower-income students since they are over-represented in vocational programmes. Compared to students in general study orientations,

vocational students who want to enrol in higher education experience less straightforward pathways and less teaching support to prepare for any application to higher education. It is promising that short-cycle programmes, in practice, have emerged as an entry route to higher education and as a transition pathway to a bachelor's degree, but challenges remain in evaluating and formalising this pathway.

Financial costs associated with higher education studies influence opportunities for higher education study since the willingness and ability to cover these costs vary by socio-economic background. Portugal has a solid foundation of direct and indirect financial supports to students, enrolling 80% of students in public institutions with subsidised tuition fees, housing, meals and the provision of other social support services. This support is combined with means-tested support in the form of study grants and extra support for mobile students in both private and public institutions.

The study grant eligibility check also determines access to other means-tested supports, including priority access to student housing and access to financial housing support, which increases its importance. It is promising that consecutive governments in Portugal have expanded the eligibility criteria for the provision of support at the minimum grant level. However, there have been limited changes to the eligibility criteria for the increased grant levels that aim to contribute to living costs. In addition, complex criteria make case management time-consuming and grant receipt uncertain, which limits the potential strength of the existing system.

Access to information about relevant opportunities shapes aspirations and plans to pursue higher education. There are considerable differences in how young people from lower socio-economic and higher socio-economic backgrounds think about their future in Portugal. One-third (33%) of students who aspire to work in high-skilled jobs do not expect to complete higher education. This misinformation gap is greater for students from lower socio-economic backgrounds than for students from higher socio-economic backgrounds. Even though career counsellors – in the form of psychologists – are required to be available in all public secondary schools in Portugal, just 18% of students in the most disadvantaged schools have formally scheduled career advice, compared with 39% in the most advantaged schools.

A special focus on drop-out rates finds that there is significant variation across fields of study after the first year in Portugal. Meanwhile, almost one-in-four (24%) students report feeling like they do not belong in higher education. Most higher education institutions in Portugal provide tutoring and mentoring services to their students to combat drop-out rates, financed by the EU-funded national Programme for Promoting Success and Reducing Drop-out Rates. The same funding has fuelled a momentum for innovation in integrating advanced analytical tools in the work to anticipate the need for and customise the design of student support. While progress has been made, challenges remain in identifying good practice and enabling institutions to adopt successful policies as the EU's Recovery and Resilience Facility funding is set to end by 2026.

1 A framework for analysing inequities in enrolment and completion of higher education

This chapter assesses whether promoting equity in opportunities to access and complete higher education remains a relevant objective across EU and OECD member countries. It also presents international evidence on three overarching factors that are important in influencing the educational opportunities of young people from lower-income backgrounds: prior achievement, financial support, and access to information. It subsequently constructs an analytical framework to structure an analysis of equity of opportunity in higher education systems.

1.1. Introduction and key findings

The landscape of higher education has turned toward massification in recent decades, which means that participation in higher education has increased across social groups. Although the student body is more diverse today than in the past, it is not fully representative of the population of young people. This indicates that there are underlying inequities in the education system, which mean that certain groups of students face relative disadvantage in accessing and participating in higher education.

Improving equity in opportunity to pursue higher education helps to ensure that individuals with academic potential can access and complete higher education programmes and is an important part of delivering a highly skilled workforce. This is essential to stimulate higher innovation and economic growth, while also helping to make efficient use of public and private funds invested in the higher education system.

There is a growing international consensus on the importance of promoting equity in higher education. European countries involved in the Bologna Process, and thus members of the European Higher Education Area (EHEA), have committed to working on the "social dimension" of higher education. They have agreed to the objective that the higher education student body should be representative of wider society. Relatedly, the OECD Council has a legal Recommendation on Creating Better Opportunities for Young People that recognises that the successful engagement of young people in the labour market and society is crucial not only for their own personal economic prospects and well-being, but also for overall economic growth and social cohesion. The OECD Ministerial Declaration "on Building Equitable Societies Through Education" acknowledges the specific role of education and skills in strengthening economic and social outcomes across countries.

This report focuses on equity from the perspective of parental income and socio-economic status. Beyond parental income, other personal and demographic aspects can be important to analyse equity of opportunity, including, for example, variations by migrant background, ethnic minority background, disability and special educational needs. These relevant aspects warrant further analysis since remain outside the scope of this report. The report will adopt a more narrow understanding of equity of opportunity, focusing on whether the education system provides students with the support and resources they need to reach their full potential and allows them to compete with their peers on a level playing field no matter their parental income. Strengthening equity of access can create learning environments that open doors for all learners, giving them fair opportunities to succeed in future (OECD[1]).

More specifically, the report considers equity of opportunity related to widening the access for young people to public higher education, and the opportunities for public higher education students to succeed in their programmes. While it is recognised that the access of mature students to higher education is relevant from an equity perspective, the report has narrowed its scope to consider the opportunities of secondary education students to immediately transition to higher education following their graduation.

Much research has been undertaken to understand the factors that can influence the success of lower-income students in enrolling in and completing higher education programmes. Drawing on Boudon (1974[2]), a distinction can be made between differences in education outcomes by socio-economic background that are due to differences in ability or performance, and differences that are due to decisions made when holding ability constant. Differences in ability are often referred to in this literature as "primary effects" of parental income, while differences in decisions are referred to as "secondary effects". This report is primarily interested in "secondary effects" of parental income on outcomes.

This report is the final output of a project funded and implemented with the European Union's Technical Support Instrument (TSI) entitled "Making Higher Education in Portugal More Inclusive". The project has analysed how to promote the equity of opportunity for lower-income students in higher education in Portugal. This final report is delivered alongside a more detailed policy action plan with concrete policy

proposals, and a piloting roadmap with suggestions for how to implement these proposals and to monitor progress.

This chapter starts by demonstrating why countries need to continue to focus on promoting widened access and student completion rates, before noting the international consensus on the need for policy action in the field. Subsequently, the chapter summarises international research and describes some of the most important factors that influence opportunities to participate in higher education, and how they are systematically influenced by parental income and socio-economic background. Finally, it builds an analytical approach to assess inequities in access and completion of higher education, in order to provide a foundation for understanding the scope of further policy action.

Key findings

Promoting widened access and supporting student success is important to help ensure that young people can thrive in a changing labour market and optimise the use of public funds when building a high-skilled workforce. It can also reinforce democratic values by ensuring equity of opportunity. There is a long-standing and broadly shared international consensus around the importance of ensuring equity of opportunity in education, which is highlighted through the Social Dimension of the Bologna Process, the European Union's European Strategy for Universities and OECD Legal Instruments related to young people and equity in education.

International research identifies at least three key overarching factors that reinforce variations in access to, and completion of, higher education between students from different groups of parental income and socio-economic status: prior achievement, financial support and information.

In most higher education systems, applicants are required to fulfil certain criteria related to prior achievement to be eligible to participate in higher education, including attending the relevant study orientations and proving sufficient academic ability. However, achievement outcomes vary by socio-economic background and build over the course of children's lives. Upper secondary education achievement, typically measured in terms of test scores, tends to be influenced by factors such as the quality of teaching, the type of school attended and access to tutoring, all of which tend to vary by parental income.

Financial costs associated with higher education studies can be substantial – in terms of tuition fees, living costs (especially for mobile students) and the opportunity cost of not working. The willingness and ability to cover these costs will depend directly on the financial capacity of students and their families to cover such costs but also indirectly on the foreseen risks and benefits, upfront cost and student finance system. Both direct and indirect factors vary by parental income.

Access to information about relevant opportunities shape aspirations and plans to attend higher education. The information received from school career guidance and higher education outreach is influenced by school-level policies and the geographic location of the family home. Social connections, including parental expectations and peer effects, also typically depend on parental income, and can shape aspirations.

Since these three factors strongly contribute to defining the opportunity sets of students as they approach the end of upper secondary education, they play a central role in the analytical framework developed for this report. Student outcomes across these three factors influence the outcomes of interest: access to higher education, access to the most selective programmes and completion rates.

1.2. Why continue to focus on widened participation in higher education?

Participation rates in higher education in developed economies have increased substantially in recent decades. The general expansion of higher education accelerated after 1960 with the development of welfare states, rising aspirations among a greater proportion of the population and increased labour-market demand for higher education graduates stemming from technological investment and increasingly advanced economies (OECD, 2020[3]). Government interventions have fuelled this expansion in efforts to promote economic development and equal opportunities, and enrolling over half of new secondary education graduates in higher education systems each year has become the norm in OECD member countries (Marginson, 2016[4]).

Although the student body in higher education across OECD member countries has become increasingly diverse, nowhere is it fully representative of the wider society in which the higher education system operates. The expansion of higher education has – to some extent at least – widened access to higher education for students from historically under-represented socio-economic groups, but, across countries, young people from lower-income backgrounds are still less likely to attend higher education programmes than their peers from higher-income families.

Continuing to strive for greater equity of opportunity may be viewed as important for at least three key reasons. First, most young people will need advanced skills from some post-secondary education – whether practical or academic – to thrive in a changing labour market. Second, it is valuable to ensure that student ability is well matched to educational opportunities to maximise human capital, notably by tapping the talents of groups that were traditionally under-represented in higher education. In turn, this contributes to an efficient use of public and private funds. Third, many see fairness and equity as intrinsically valuable and as fundamental tenets of democracy.

1.3. A broad international consensus on the importance of equity in education has emerged

The aim of improving equity of opportunity in education is a key part of the objectives of the European Education Area (European Commission, 2024[5]) and the European Pillar of Social Rights (European Commission, 2024[6]) which stipulates, in its first principle, that “Everyone has the right to quality and inclusive education, training and life-long learning in order to maintain and acquire skills that enable them to participate fully in society and manage successfully transitions in the labour market”. Several international agreements and declarations also document cross-country political commitment to equity in education, including post-secondary and higher education. These include the Social Dimension of the Bologna Process (European Commission, 2020[7]), the European Union’s European Strategy for Universities (EUR-Lex, 2022[8]), and the OECD Legal Instruments related to young people and equity in education (OECD Legal Instruments, 2022[9]; OECD Legal Instruments, 2022[10])., which are summarised below.

1.3.1. The Social Dimension of the Bologna Process

European countries involved in the Bologna Process have committed to moving towards more equal representation of all sections of society in higher education. The “social dimension” of the Bologna Process was defined as the aspiration that the “student body entering, participating in and completing higher education at all levels corresponds to the heterogeneous social profile of society at large” in the member countries of the European Higher Education Area (EHEA) (Schmidt and Onita, 2023[11]). Since defining the concept of the “social dimension” in the 2007 London communiqué, the Bologna Process ministerial texts

have increasingly moved from setting strategic objectives towards discussing practical considerations of the actions required to prioritise the social dimension (European Commission, 2020[7]).

In line with the objective to promote the social dimension, Eurydice (2024[12]) reports in their Bologna Process 2024 Implementation Report that several countries incorporate inclusion, diversity and equity in higher education in strategies concerning the education system as a whole (Albania, Armenia, Estonia, Georgia, Greece, Italy, Latvia, Montenegro, Romania and Türkiye), while others include it in higher education-specific strategies or policy plans (Bulgaria, Czechia, France, Hungary, Kazakhstan, Malta and Slovenia). Some countries have adopted specific strategies or policy plans on the social dimension of higher education (Austria, Croatia, Finland, Ireland, Lithuania, the Netherlands, Switzerland, and the United Kingdom). Meanwhile in Belgium (French Community), the inclusivity of higher education is the explicit aim of a government order (decree) on inclusive higher education, which contains a set of measures similar to that of a strategic document. Finally, five education systems (Liechtenstein, Norway, Portugal, Sweden, and Ukraine), mainstream inclusion or equity in higher education into strategies or plans for a broader range of policy objectives (Eurydice, 2024[12]).

Box 1.1. Austria's national strategy on the social dimension of higher education

Austria's 2017-2025 National Strategy on the Social Dimension of Higher Education aims to mainstream the social dimension into education policy making. The national strategy resulted from a rigorous consultation phase involving over 800 experts representing over 80 organisations, undertaken over the course of a year. It defines several quantitative targets that aim to improve equity in higher education and sets out concrete points of action and stakeholders that are to take responsibility for implementation. These activities span three overarching target dimensions: 1) inclusive access; 2) drop-out and academic success; and 3) the regulation of higher education policy. A host of initiatives have been launched under each of these dimensions (Austrian Ministry of Science Research and Economy, 2017[13]).

The national approach is interesting in its potential to promote a joint up approach to widening access. An interim report shows that the social dimension has been anchored within the strategic documents in nearly all higher education institutions and several initiatives have already been launched.

However, there are challenges with monitoring progress. The interim report provides data on indicators for the quantitative targets included in the Strategy that indicate limited progress in achieving the broad targets to date by 2022. Recognising that many of the initiatives likely need more time to take effect, the final report will be more informative about the success of the Strategy in achieving progress. In addition, project-based evaluations might offer more specific insights into what policy actions have worked (Park and Preymann, 2022[14]).

1.3.2. The European Union's European Strategy for Universities

The European Commission's 2022 Communication on a European Strategy for Universities (COM/2022/16 final) aims to support universities to adapt to changing conditions and to contribute to Europe's resilience and recovery, in part by promoting equity (EUR-Lex, 2022[8]). The Strategy recognises excellence and inclusion as distinctive features of European higher education and places particular emphasis on the need to foster diversity, inclusiveness and gender equality in the higher education sector.

The Strategy proposes to focus on achieving four joint key objectives by mid-2024. The first objective is to strengthen the European dimension in higher education and research by implementing a set of flagship initiatives to promote transnational co-operation with a European approach. The Strategy recognises that placing increased responsibilities on universities to support Europe's economic and social recovery means

they will need appropriate financial support. At the same time, it emphasises that any EU funds and programmes must not replace, but operate in addition to, sufficient national public funding and other public and private investments (EUR-Lex, 2022[8]).

The second objective is (particularly notably for the purpose of this report) to support higher education and research as conduits of a European way of life through their threefold focus on 1) quality and relevance for future-proof skills, 2) diversity and inclusion 3) democratic practices, fundamental rights and academic values and freedom of scientific research. The Strategy proposes that flexible and attractive academic careers, valuing teaching, research, entrepreneurship, management and leadership activities should be promoted. It is noteworthy that the Strategy encourages institutions to implement institutional change through concrete measures for diversity and inclusion, including voluntary, quantified targets for inclusion and inclusive gender equality plans, building on the Rome Communiqué (EUR-Lex, 2022[8]).

The third objective is to support the full engagement of higher education institutions in the unfolding green and digital transitions and the fourth objective is to support institutions in becoming more outward looking and competitive on the global scene (EUR-Lex, 2022[8]).

Initiatives to promote equity and inclusion across the EU are also backed by EU funding. First, in the Renewed EU agenda for higher education, the European Commission committed to providing direct Erasmus+ support to help higher education institutions develop and implement integrated institutional strategies for inclusion, gender equality and study success from admission to graduation, including through co-operation with schools and vocational education and training providers (EUR-Lex, 2017[15]). Second, the European Social Fund Plus (ESF+) is the EU's main instrument for investing in people and focus on ensuring a fair and inclusive recovery from the COVID-19 crisis, giving priority to the objective to promote equal access to quality education and training (European Commission[16]). Finally, the Recovery and Resilience Facility (RRF) is a temporary instrument that is part of the EU's approach to address the fallout of the COVID-19 crisis (NextGenerationEU). It supports initiatives in several pillars, where reforms and investment in policies for the next generation aim at improving access to general, vocational and higher education, as well as its quality and inclusiveness (European Commission[17]).

1.3.3. The OECD Legal Instruments related to young people and equity in education

In June 2022, the OECD Council adopted a legal Recommendation on Creating Better Opportunities for Young People (OECD/LEGAL/0474) (OECD Legal Instruments, 2022[9]). The Recommendation recognises that the successful engagement of young people in the labour market and society is crucial not only for their own personal economic prospects and well-being, but also for overall economic growth and social cohesion. It also recognises that young people are the backbone of prosperous societies, economies, and fit-for-future democracies. The Recommendation aims to ensure that young people can prosper by gaining adequate skills, employment, access to a social safety net and trust in their governments.

Two specific Recommendations in "Creating Better Opportunities for Young People" are directly relevant to this report on policies to enhance inclusion, widen access and increase student success in higher education (OECD Legal Instruments, 2022[9]):

> *Recommendation II.5. Provide learner orientation and career guidance, including by engaging with employers through workplace visits, career talks and job shadowing, and providing information on skills in demand in the world of work and the relationship between education and employment.*
>
> *Recommendation II.6. Enable equitable access to pursue and continue post-secondary education and training by tackling financial and non-financial constraints, especially for young people from under-represented groups, including through reviewing existing financial aid systems for students and, where relevant, tuition fees and student loan forgiveness arrangements.*

Following the OECD Council Recommendation on Creating Better Opportunities for Young People, the OECD Education Policy Committee (EDPC) adopted a specific Declaration on Building Equitable Societies Through Education (OECD/LEGAL/0485), at the December 2022 Ministerial meeting (OECD Legal Instruments, 2022[10]). The Declaration states that ministers and representatives of OECD countries call on the OECD to:

> *Support countries, based on sound evidence, in designing and implementing education and skills policies that recognise the diverse backgrounds and needs of learners, and provide them with effective and equitable opportunities to develop and maintain their potential, and contribute to society.*

The OECD Youth Policy Toolkit provides hands-on practical guidance to improve the design and implementation of youth policies and will include good practice examples from OECD member countries (OECD, 2024[18]). These legal instruments and accompanying work at international level provide additional impetus for – and inputs to – this report.

1.4. Outcome indicators and key factors that are important in understanding equity of opportunity in higher education

Understanding and addressing inequities in access to and completion of higher education is not straightforward due to complex patterns of multidirectional causality. This section details the key outcome indicators of interest and explores international research on key factors influencing these outcomes.

1.4.1. Three outcome indicators are of key interest when considering the level of equity of opportunity in higher education

This report will focus on indicators that describe three key outcome areas. First, indicators that describe access to higher education for students from lower socio-economic backgrounds is valuable since it lays the foundation for population attainment rates and a high-skilled workforce. The indicators considered in this area focus primarily on students in upper secondary education, including prior achievement, financial support and information they have about their opportunities before applying to and entering higher education. It is also relevant to consider the ability for prospective applicants to plan for their student life, particularly in terms of predictable access to financial support and support to move out of the parental home if needed to access the most selective programme as feasible, considering their entry grades.

Second, indicators that describe access to the most selective programmes for students from lower-income backgrounds give a good indication of whether students from disadvantaged backgrounds are able to compete equitably with students from advantaged backgrounds for the most sought-after study places. The indicators relevant in this area focus on the representation of lower-income students in selective programmes and the quality of the match between students' academic potential and measures of the quality of the programme they access. Many of the barriers to equitable access to the most selective programmes are similar to those discussed above in relation to entry rates for students in general programmes. However, there are some specificities that are worth highlighting, in particular with relation to the ability to relocate.

Finally, indicators that describe student completion rates are relevant to understand whether widened access fulfil its potential of increasing population education attainment rates. Supporting student completion rates through drop-out prevention and re-enrolment policies can be especially relevant among certain groups of students facing different types of challenges and is not isolated to students from lower-income backgrounds.

The three target outcome areas – deemed to be desirable from an equity perspective – are summarised below:

1. **Access to higher education.** The overall application, acceptance and enrolment rates are an indication of the degree of access for lower-income students. This outcome area focuses on the transition from secondary education to higher education for all lower-income students, but with a special focus on lower-income students from vocational secondary education programmes.
2. **Access to the most selective programmes.** The application, acceptance and enrolment rates observed in the most selective programmes are an indication of the degree to which lower-income students have been able to integrate into the most prestigious courses. This outcome area focuses primarily on academically talented lower-income students.
3. **Higher education completion rates.** The progression and completion rates are indications of the longer-term success of higher education enrolment for lower-income students. This outcome area focuses on all lower-income students who enrol in higher education.

1.4.2. Key factors that shape opportunities to access and complete higher education

This section summarises international research on key factors that shape opportunities to participate in higher education, focusing on the three outcome areas described above: access to higher education; access to the most selective programmes; and completion rates. In order to consider all three of these outcome areas in some detail, the report will assess outcomes in relation to young students only, focusing on the direct transition from secondary education to higher education without considering students who take one or several gap years. As such, access to higher education for mature students – while relevant from an equity perspective – is beyond the scope of this report.

Systemic differences in prior achievement across students from different socio-economic backgrounds

A large portion of inequalities in access to educational opportunities build over the course of childhood and result in great variation of outcomes in secondary education. While it is beyond the scope of this report to consider a life-cycle perspective of the reasons behind this variation in achievements, this section considers how upper secondary education achievements contribute to shaping inequities in accessing and completing higher education, including the most selective programmes. Specifically, this section considers how differences in achievement – typically measured in terms of test scores – can be influenced by the quality of teaching, access to tutoring, and attending the required secondary education orientation for eligibility to participate in higher education programmes.

Test scores in secondary education assessment and national examinations are one of the most important conditions for entering higher education. Passing final school and national exams are often central criteria for graduating from secondary education, as well as a prerequisite to apply to higher education. In nearly all (29) OECD jurisdictions participating in Education at a Glance, national examinations in general upper secondary programmes are intended to grant eligibility for tertiary education (OECD, 2023[19]).

Achieving excellent test scores is also a prerequisite for admission to the most selective higher education programmes. Using data from England, Chowdry et al. (2013[20]) find that test results from school also explain a large part of gaps in enrolment in elite universities. Similar trends have been highlighted in the United States with low grades in secondary school education driving a large part of the low representation of low-income students at elite universities (Chetty et al., 2020[21]).

Poor achievement and preparation in secondary education means that students – if they manage to enrol in higher education – may struggle to progress through their studies and complete their programmes. Student academic achievement in secondary education, measured for instance in terms of their test scores and courses passed during the beginning of academic studies have been shown to be strongly predictive of student success, particularly in the second and third years of programmes (Schmidt, Boero and Méndez Vera, 2023[22]; Delogu et al., 2024[23]; Gonzalez-Nucamendi, Noguez and Neri, 2023[24]). Results in certain

particularly challenging courses can be especially important predictors for later success (da Silva et al., 2022[25]).

Yet, achievement gaps by socio-economic status are widely documented. For instance, socio-economic status explained 15% of the variation in mathematics performance within each country across the OECD's Programme for International Student Assessment (PISA) data collected in 2022, and 14% of the variation in science performance. In the Slovak Republic, Hungary, Czechia, Belgium, France, and Switzerland, students' socio-economic status accounts for 20% or more of the variation in performance (OECD, 2023[26]). Similarly, most of the socio-economic gap in higher education enrolment of English students in the United Kingdom is explained by academic test scores at age 18 (Chowdry et al., 2013[20]).

Students who attend a prestigious secondary education with high-quality teaching tend to have an advantage in achieving high test results, but also in terms of being better prepared for the requirements of higher education. For instance, secondary schools can provide a significant advantage by teaching useful soft skills, giving relevant and stretching career guidance, and act as a signalling effect for higher education admission offices. It has been shown that the secondary school attended is a major determinant of inequalities in outcomes between students with low- and high-income families in England.

Findings also indicate that attending a high-quality secondary school systematically helps students attend a highly selective higher education programme. Indeed, Campbell et al. (2022[27]) find that the socio-economic gap in how well students can match their academic achievement with a higher education programme is reduced by up to 79% when considering students from the same school. Similarly, Hoxby and Avery (2013[28]) use data from the United States to descriptively show that low-income but high-achieving students only tend to apply to selective higher education institutions if they are from schools in large cities with a critical mass of high achievers that tend to send many students to selective higher education institutions. By contrast, equally well-achieving students from academically weaker secondary schools tend to enrol in less selective institutions.

The inequities in access to education resulting from variations in performance across secondary schools is especially problematic where secondary school quality varies systemically with family income. For instance, the highest-quality secondary school may be fee-paying schools, require entry exams for prospective students, or have catchment areas where house prices are high. Such factors necessitate an elevated family income, and a parental will to invest in their children.

Higher family income can also support higher test scores by investment in additional tutoring, so called "shadow education", beyond that provided in secondary education. Such private investment can generate high marginal returns in jurisdictions where scores from school-leaving examinations and separate entry examinations for higher education are important. Using cross-national data from the 2012 Programme for International Student Assessment, Zwier, Geven and Werfhorst (2021[29]) show that students from higher socio-economic backgrounds participate in more shadow education than their less well-off peers, and that this relationship tends to be stronger in jurisdictions with high-stakes testing. As such, contexts where there is a lot to gain from private investment in education foster possibilities for greater advantages for those with parental resources.

To achieve the right results, students also must take the required courses in secondary education in order to be eligible for higher education. Many education systems operate with different tracks of study orientations depending on whether students are foreseen to enter the labour market or further studies after secondary education. Students in secondary education programmes with vocational orientation tend to be disadvantaged relative to those in general programmes when applying to higher education, since courses in vocational programmes tend to be less academically rigorous.

While systems are technically designed to support students with higher vocational aptitude into vocational tracks and students with higher academic aptitude into general orientations, this division tends to be disproportionately influenced by the socio-economic background of students. In turn, this reinforces socio-

economic gradients in educational opportunities (OECD, 2021[30]). For instance, in the Netherlands where students are sorted into different lower secondary programmes at the age of 12, based on test results and a teacher recommendation, students with high socio-economic status are more likely to enrol in pre-university schools and less likely to enrol in pre-vocational school than students with lower socio-economic status, even when standardised test scores and teacher recommendations are identical (Werfhorst, 2021[31]). Typically, the earlier that tracking happens, the more it depends on parental socio-economic status. This means that early selection into academically greater- and less-demanding orientations tend to mean lower social mobility (Godin and Hindriks, 2018[32]; European Commission, 2020[33]).

This disadvantage can accumulate over the course of a higher education programme. When students from vocational orientations do pursue higher education, they are less likely to complete their studies. OECD data illustrates that there is a gap in the completion rates of bachelor's degrees (or equivalent) between those enrolling from vocational and general pathways in several jurisdictions. The gap is notable, for instance, in France, Belgium, and Slovenia (OECD, 2022[34]). Similarly, when comparing students with the same secondary education leaving diplomas in the United Kingdom, having vocational qualifications is associated with dropping out and receiving lower final grades in university (Dilnot, Macmillan and Wyness, 2023[35]). Dilnot, Macmillan and Wyness (2023[35]) also find that there is an additional penalty associated with having low socio-economic status *and* a vocational qualification.

The reliance on financial support systems makes access and completion more uncertain

Financial costs associated with higher education studies can be substantial; and the ability to cover these costs will factor into young peoples' decision of whether to apply and enrol in higher education. The willingness of students and their parents to pay for these costs will depend on the foreseen benefits and risks, and existing financing opportunities (Box 1.2).

Investing in higher education would typically lead to higher lifetime earnings. There are significant average wage returns to undertaking a bachelor's degree or equivalent compared to upper secondary attainment across OECD jurisdictions (OECD, 2024[36]). These benefits are greater for longer and higher-quality higher education programmes. For example, Suga (2019[37]) finds significant postgraduate wage premia for both men and women in Japan, even after taking account of self-selection bias. For instance, Canaan and Mouganie (2018[38]) use linked administrative data from France to show that attending higher-quality higher education entails significant earning potential for lower-income students as well as higher-income students.

However, upfront costs can be high for students and their families, particularly if they lack access to student grants or other student financing options. In higher education systems where tuition fees exist, they can be the main out-of-pocket cost experienced by students, along with any additional charges, such as laboratory fees, and costs of required books and supplies (OECD, 2020[3]).

Countries vary significantly in the share of the cost of higher education that is covered by private households, and to what extent private contributions and living cost expenses can be covered through public grants or subsidised, state-backed loans. For instance, the proportion of students who received public grant or loan support ranged from 70-100% in most Nordic and Anglophone systems, to fewer than 30% in Austria, Switzerland, and Portugal (OECD, 2020[3]).

Research indicates that student financial support systems can be effective in promoting enrolment in higher education. The reliance of lower-income students on student finance and scholarships has been shown, for instance, by Steiner and Wrohlich (2012[39]), who estimate the effect from means-tested student aid on enrolment in Germany and find a small but significant positive effect. Joensen and Mattana (2021[40]) use data from Sweden and find a larger effect of grants on student decisions, debt and human capital when alternative means of financing, including part-time work, are costlier. They also find that loan repayment conditions affect drop-out rates significantly more when the share of grants comprising total financing is smaller. Such liquidity constraints are disproportionately faced by families in lower-income brackets who

are less likely to be able to put away the often-considerable savings required for tuition fees and living costs.

Costs related to studying may be particularly high for students who need to live away from their parental home, which is particularly relevant for the ability of talented students to move to attend selective programmes. It may therefore be particularly difficult to ensure an optimal matching of students and programme if such living costs need to be covered out of pocket. For example, Lovenheim and Reynolds (2012[41]) show a wealth effect to college attendance in the United States: when housing wealth increases as a child nears college age, the child is more likely to attend a more selective college. Similarly, it has been shown that housing prices play a significant role for students choosing to study abroad, as policy evaluations of the Erasmus+ programme in EU countries have reported (Beine, Noël and Ragot, 2014[42]). Since candidates from lower-income families face greater financial constraints, they are more likely to be required to opt for a local programme.

Higher parental financial resources during university have been shown to be associated with improved graduation rates (Hamilton, 2013[43]; DeAngelo and Franke, 2016[44]). Accessing financial support can therefore be a key factor contributing to higher education students dropping out and is a factor that is more relevant in systems where the costs of studying – including fees and living costs – are high. In the high-fee environment of the higher education system of the United States, research indicates that financial aid significantly affects retention, with varying impacts depending on the type of support and institution (Dynarski, 2003[45]; Singell, 2004[46]). There is more limited evidence from Europe, but Fack and Grenet (2015[47]) find that the eligibility for a EUR 1 500 needs-based cash allowance has a positive and significant impact on students' persistence rates after the first year. Although the authors do not find significant effects on on-time degree completion for undergraduate students, they do find positive and significant completion effects among master's students (Fack and Grenet, 2015[47]).

Lower-income students tend to be more likely than higher-income students to have to work long work hours during studies to finance them. Research indicates that high-school graduates from low-income families are more likely to need to work to cover costs related to studying, which can mean that they are at relatively greater risk of not being able to spend sufficient time on their studies (Cabrera, Nora and Castañeda, 1992[48]; Goldrick-Rab, Harris and Trostel, 2009[49]). A high number of hours spent in paid work during higher education studies tends to correlate with lower academic performance, as extra-curricular work hours place an additional burden on students. Research from a wide range of countries finds evidence in support for this link, for example from Portugal (Carreira and Lopes, 2021[50]), Germany (Behr and Theune, 2016[51]), Spain (Dolton, Marcenaro and Navarro, 2003[52]; Lassibille and Navarro Gómez, 2011[53]), the United States (Kim, 2007[54]), and the United Kingdom (Thomas, 2002[55]).

A broad geographical spread of higher education institutions can also serve as an indirect form of financial aid, as it helps lower mobility costs. In the 1990s, the Italian tertiary system increased the number of universities at the provincial level. By taking advantage of this shift and controlling for enrolment selection, Oppedisano (2011[56]) find that the establishment of a new university campus led a 6 percentage-point reduction in the drop-out rate within the legal duration of a degree.

The financial risk – both real and perceived – involved with investing in higher education may also vary depending on students' socio-economic backgrounds (Outreville, 2015[57]). For instance, some courses may not generate expected returns that exceed the costs of undertaking studies. The costs associated with education may also involve more risk for first-generation students who cannot easily access information from their personal network about the potential reward of investing in post-secondary education, nor leverage their network for a job in their sector after their studies. For instance, research from Italy indicates that the expected probability of succeeding at university is lower, perceived returns to education and expected wages are lower, and the perceived costs of university are higher for students from lower socio-economic backgrounds (Barone, Triventi and Assirelli, 2018[58]). Similarly, research from the United Kingdom finds that 16 year-olds who agree that they knew someone who could help them get

a job after leaving education went on to earn 4% more than comparable peers at age 26 (Mann, Kashefpakdel and Percy, 2017[59]).

Even when the post-secondary career path is well-known with career and earnings prospects understood, lifetime outcomes are uncertain and depend on factors like the ability to successfully complete studies and find an appropriate job (Blanden, Doepke and Stuhler, 2023[60]). This element of risk can be illustrated by research from Germany. Using 1984-2009 data of sons and fathers from the German Socio-Economic Panel Survey, Huebener (2012[61]) finds that sons with risk-taking fathers have a higher educational mobility and persistently higher income mobility than peers with risk averse fathers.

It should be the recognised that if the inequities in prior education and higher education systems are too strong, financial barriers will only be a secondary factor in student access to higher education. For instance, in Chile, the effect of the introduction of free tuition fee for first-generation students was not as impressive as expected, since entrenched inequalities in outcomes in prior education continue to limit the opportunities of lower-income students in the selection process (Espinoza et al., 2022[62]).

At the same time, it is not sufficient that financing options exist; students and their families need to be made aware of them and trust that they will receive support throughout their studies in order to utilise them. For instance, research from the Netherlands estimates that 24% of all eligible first-year students fail to apply to a means-tested student grant (Konijn, Visser and Zumbuehl, 2023[63]).

Box 1.2. Social mobility is low where inequality is high

Incentives to invest in children's education are stronger where the overall income inequality in societies is high, since the relative reward from the investment is greater (Blanden, Doepke and Stuhler, 2023[60]). In such cases, the long-run credit constraints faced by students from lower-income backgrounds means that the disadvantage from not investing can lead to accumulated disadvantage over the course of childhood (Lovenheim and Smith, 2023[64]; Andrews, Imberman and Lovenheim, 2020[65]).

Where inequality is high, intergenerational socio-economic mobility tends to be low. This means that when income inequalities are high, fewer children from lower-income families tend to earn higher incomes as adults, a cross-country trend often referred to as the "Great Gatsby curve" (Godin and Hindriks, 2018[32]; Björklund and Jäntti, 2009[66]; Corak, 2013[67]). One attempt to quantify this effect comes from Cingano (2014[68]), who finds that a rise in income inequality by 6 Gini points is accompanied by a 4% decrease in the probability of individuals with parents of low educational background being in higher education.

The uneven access to information contributes to defining students' opportunities

It is relevant to consider aspirations to attend higher education since these have been shown to be predictive of enrolling in higher education, after taking into account academic ability. For instance, Brumley, Russel and Jaffee (2019[69]) find this trend using data from the United States, with the strongest association for students with high socio-economic status. In France, research also suggests that aspirations are predictive of future education achievement when taking into account academic ability and family socio-economic status (Guyon and Huillery, 2020[70]). Similarly, in Germany, the persistence of intergenerational income is significantly reduced when accounting for previous career preferences (Schüle, 2023[71]).

Research finds that students from families with lower incomes tend to have lower aspirations for higher education than students from higher-income families. For instance, research using data from Germany finds that preferences differ significantly by socio-economic background (Schüle, 2023[71]; Lergetporer, Werner and Woessmann, 2021[72]). Guyon and Huillery (2020[70]) analyse results from a survey in the Paris Metropolitan Area, France, and finds that the overall socio-economic differences in aspirations can be

largely explained by social differences in awareness and self-assessment. Similar trends are seen across the OECD member countries.

A necessary condition for students to aspire to complete higher education is that they are aware that they can do so. Information about the often-complex higher education systems, costs and benefits, as well as requirements and application strategies, is not readily available to all young people and their families. Having access to relevant information is an important factor in students' enrolment, programme match and completion rates. There are indeed socio-economic gaps in information and knowledge about requirements for a desired career. For instance, there is a socio-economic gap across OECD countries in the proportion of those aspiring to work in high-skilled occupations but do not expect to complete a tertiary degree (OECD, 2019[73]).

Higher education systems can be challenging to understand and the multitude of options to consider can mean that students and their families cannot get an accurate overview of their opportunity set (Lavecchia, Liu and Oreopoulos, 2016[74]). With too many choices, it is difficult to evaluate each relative to the constraints and desires that students face and so reach an optimised decision (Scott-Clayton, 2011[75]). Instead, students and their families tend to make decisions about further studies based on prior knowledge and readily available information (Hoxby and Avery, 2013[28]; Hoxby and Turner, 2013[76]).

When decisions about higher education are based on prior or readily available information, the students' social interactions become particularly important (Carrell and Sacerdote, 2017[77]). Students look toward the career pathways and advice of the peers and adults in their social circle that they respect and trust. Young people in family and social circles where few, if any, individuals have pursued, or are planning to pursue, higher education, are therefore often facing an information gap compared to peers with several personal examples of opportunities and strategies to navigate the complex system of higher education admissions and financing.

Expectations from parents and other adults, such as teachers and extended family, have been shown to be relevant for young people's decisions about education. Parental aspirations are shown to be strong predictors of the educational aspirations of their children in the United Kingdom, when controlling for the socio-economic status of the family parents and the cognitive and noncognitive skills of the child (Lekfuangfu and Odermatt, 2022[78]). Similarly, in the context of the German- and French-speaking parts of Switzerland, Buchmann, Grütter and Zuffianò (2021[79]) find positive and two-directional associations between parental educational aspirations and children's belief in their own academic abilities.

Moreover, qualitative evidence from the United Kingdom suggest that the set of skills and social resources that influence how families engage with the world differ by socio-economic status in a way that means that young people from better-off backgrounds tend to consider higher education to more obviously be within the set of opportunities they have, while young people from lower-income backgrounds tend to be more likely to believe that higher education is not within their reach (Archer et al., 2012[80]). Similarly, in Australia, parents' expectations of their children's achievement are positively affected by their own education and their children's enrolment in a private school, when controlling for children's achievement in school (Dockery, Koshy and Li, 2022[81]).

Secondary schools can be important for subtle guidance and practices around university applications. Research using linked administrative data from the United Kingdom shows that school-level policies, practices and context may be influencing students' decisions around whether or not to apply for higher education, regardless of the socio-economic background of students (Prior and Leckie, 2023[82]).

The information gap can also be illustrated by the effectiveness of providing information to young people from disadvantaged backgrounds who perform well in secondary education. Hoxby and Turner (2015[83]) consider the knowledge of low-income high achievers in the United States. They find that many students have significantly misunderstood aspects of the higher education system, including net prices, expected outcomes, suitable institutions and types of institutions. The authors find that targeted information helping

to clear up relevant issues help students apply and enrol in programmes that are a better match to their skill sets (Hoxby and Turner, 2015[83]).

Importantly, aspirations not only affect whether students apply to and enrol in higher education, but also the programmes to which they apply. Students from low socio-economic backgrounds in the United States are less likely, compared with their better-off peers, to aspire to the most selective educational pathways, even when they have the same test scores (Hoxby and Avery, 2013[28]). Similar evidence is found in the Paris Metropolitan Area in France, where lower-income students are less likely to aspire than high-income students to ambitious educational pathways, even after controlling for academic ability (Guyon and Huillery, 2020[70]).

Receiving personalised information targeted to students' abilities and financial needs can be effective in increasing enrolment in more selective programmes. The Expanding College Opportunities project targeted high-achieving, low-income students in the United States. They were mailed application fee waivers that did not require any paperwork, along with semi-customised information about the application process and students' net cost of attending. An evaluation of the project found significant positive effects on enrolment in selective universities (Hoxby and Turner, 2013[76]).

Relatedly, students with lower socio-economic status may not be willing to move far away from their parental home, which may limit the programmes they have access to. First-generation higher education students in Germany are nearly 10 percentage points less likely to study at one of the top 200 institutions ranked in the QS World Ranking. On average, they study 80km closer to home than their non-first-generation peers and have a nearly 7 percentage point higher probability of studying in the same federal state as where they completed secondary education (Shure and Zierow, 2023[84]).

One explanation that has been offered for the aspirations gap is the theory of relative risk aversion. As put forward by Goldthopre (2010[85]), the rational action theory posits that participants in education systems will work toward avoiding negative relative social mobility. That means that families will try to achieve a similar educational attainment relative to their peers as their parents have relative to their peers. Van de Werfhorst and Hofstede (2007[86]) find some support for this theory. Using survey data from Amsterdam, in the Netherlands, they show that young people from all socio-economic backgrounds exhibit an aversion toward downward social mobility relative to their parents' starting point.

It has also been suggested that aspirations and attitudes are important when considering completion rates. Academic research highlights the many multifaceted and interdependent reasons why students may decide to drop out of their higher education programmes (Gijón et al., 2023[87]; Aina et al., 2022[88]; Urbina-Nájera, Camino-Hampshire and Cruz, 2020[89]). For instance, in their comprehensive review of the socio-economic literature on student determinants of dropping out of higher education, Aina et al. (2022[88]) find that student persistence depends on a set of interlinked factors including student characteristics, factors related to socio-economic background, integration and commitment to studies, as well as institutional system design and labour-market characteristics (as explored in detail in the student tracking report delivered as part of this project). The authors argue that the effects of these factors on actual drop-out decisions are mediated by a students' abilities to integrate into the academic system.

Information about what can be expected, and knowledge of study field preferences are also important for student completion rates. Research from Germany shows that students who end up selecting programmes that do not match their preferred field of study are more likely to extend their time spent in education beyond the theoretical duration of their programmes or ultimately drop out compared to those who experienced a greater match. The authors find that these effects are particularly strong among lower-income students (Berlingieri, Diegmann and Sprietsma, 2023[90]). Similarly, a study from Portugal finds that students who enrol in a field of study that is not their first preference are more likely to leave after the first year of the programme, change field, delay graduation or drop out of higher education (Ferrão and Almeida, 2019[91])

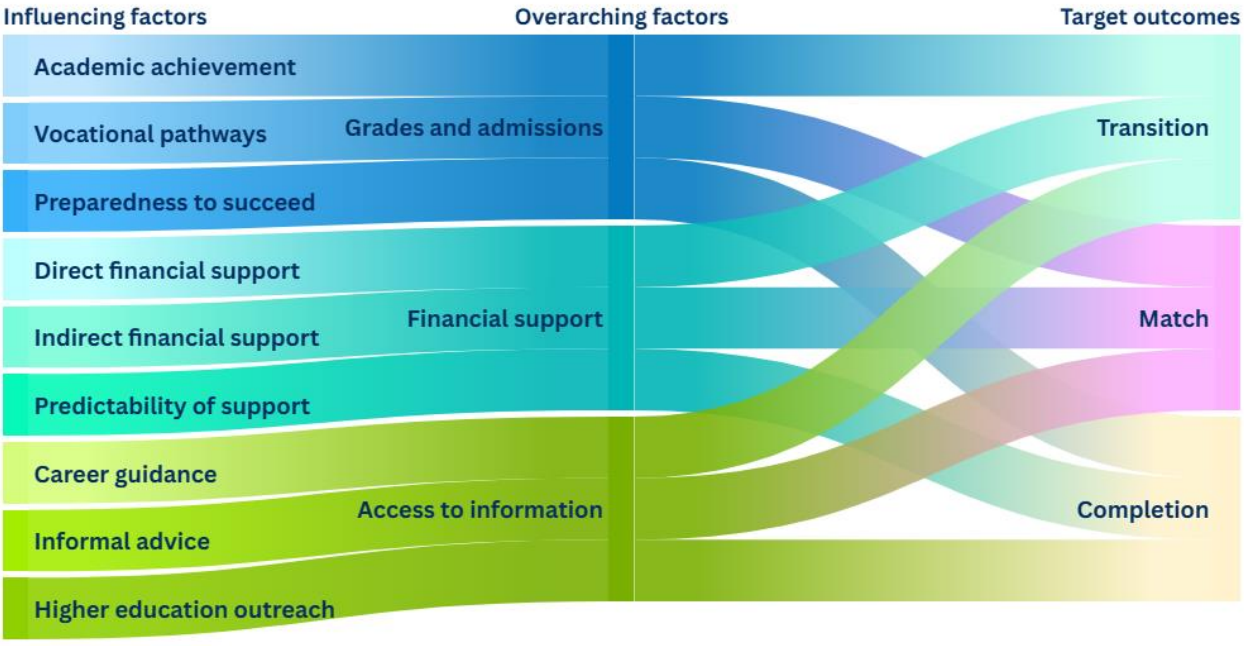
1.5. Developing a framework for analysing equity challenges in higher education

The international research on factors that influence access to higher education, access to the most selective programmes, and completion rates, can be distilled into an analytical framework. This can help to disentangle key factors that contribute to inequities in higher education access and completion and investigate avenues for policy development. Three key overarching sets of factors – which form analytical themes – emerge as important for understanding key drivers of inequitable opportunities in higher education:

1. **Prior achievement.** This set of factors groups together challenges that students face in the transition from secondary education to higher education. This includes barriers related to obtaining eligibility to access higher education, such as achieving sufficiently high grades in secondary education exams and higher education entry exams and managing the admissions system. These barriers to achieve eligibility tend to be particularly high for lower-income students, students from schools in certain geographical areas, and students from vocational secondary education programmes.
2. **Financial support**. This set of factors includes challenges related to financial constraints. For example, students and their families must manage tuition fees, housing costs and other living costs given the available family income, student finance, and in-kind supports provided via welfare services or the education system. Financial barriers tend to be greater in families with lower incomes and be of particular relevance in cases where students want or need to live independently to attend a well-matched higher education programme.
3. **Access to information**. This set of factors refers to challenges that students face in obtaining understandable and pertinent information about their opportunities and the associated requirements. Within this set of factors, such information barriers are discussed together with issues related to the support students receive in discussing aspirations and encouraging plans that align students' interests and academic abilities. There tends to be both information and aspiration gaps across students from families with different levels of income.

An analytical framework, including the three overarching factors and factors that contribute to these, as well as the key outcome areas is illustrated in Figure 1.1.

Figure 1.1. A stylised framework for analysing equity challenges in higher education



Note: Developed by the authors.

This report analyses the context of equity of opportunity in higher education by using the analytical framework presented in Figure 1.1 as a tool to structure its analysis. The assessment of current outcomes builds on research conducted in a diagnostic phase. Each section of the report proposes policy responses relevant to Portugal drawing on good or promising practice from international policy practice. The international good practice examples are selected from a more detailed good practice report delivered separately to the Portuguese authorities as part of the project. This report also integrates a summary of a detailed student tracking report that provides information on the use of analytical models in promoting student success, including promising policy examples relevant to Portugal.

The remainder of this report starts by taking stock of equity of opportunities to access higher education, to access the most selective programmes, and to complete programmes (Chapter 2). Subsequently, the report analyses outcomes in the policy areas that have been identified as important in determining opportunities to access and complete higher education from an equity perspective. First, it assesses the role of prior achievement, focusing on grades and admissions from different study orientations in secondary education (Chapter 3). Second, it assesses the adequacy of the system of direct and indirect financial support in Portugal, including the predictability of this support (Chapter 4). Third, it assesses access to information, considering in-school and out-of-school sources of information for students (Chapter 5). Finally, the report provides an overview of promising practices at the level of higher education institutions that promote study success and programme completion (Chapter 6). Table 1.1 summarises the key findings and recommendations included in the remaining chapters of this report.

Table 1.1. Policy recommendations

Key findings	Recommendations
Reduce barriers for lower-income barriers to equitably compete for public higher education study places	
Accumulated educational disadvantage among lower-income students from general secondary education programme orientations relative to those from higher-income backgrounds raise barriers to widened access to higher education and achieving a good student-to-programme match.	Expand and formalise in-school exam-preparation study sessions for secondary education students in key subjects, for example, by providing study space, peer mentors and/or teacher support.
	Build on the existing preferential access schemes (priority quota) that acknowledges systemic differences in prior academic opportunities and achievement.
Students from vocational secondary education programmes who want to transition to higher education experience higher barriers to entry than students from general study orientations, which raises barriers to widened access to higher education.	Strengthen alternative pathways to bachelor's degrees via special competitions for holders of dual certification (vocational students) and holders of short-cycle diplomas (CTeSPs).
Ensure that the design of the financial support system is fit for purpose	
Despite a solid foundation of direct and indirect financial supports, students can still experience credit constraints when it comes to paying for living costs while studying, which raise barriers for widened access, achieving a good student-to-programme match and supporting completion rates, particularly for mobile students.	Revise the formula for calculating the means-tested grant with the aim of making an explicit contribution to tuition fees and an explicit contribution to living costs, and consider the possibility of increasing the generosity of living cost contributions to lower-income students and mobile grant recipients.
	Explore the possibility of introducing a state-guaranteed living cost loan to students where the state and students jointly contribute to the portion of necessary living costs during studying that are not covered by the grant, ensuring cross-party, long-term commitment and attention to address culturally important concerns related to taking on loans.
Despite large-scale government spending to increase the quality and stock of subsidised student housing, a shortage of student beds is likely to remain in certain geographical areas, which raises barriers for widened access, achieving a good student-to-programme match and supporting completion rates, particularly for mobile students.	Continue to improve the accessibility of affordable student housing through targeted investment and collaborations with regulated private providers.
Complexities in the eligibility criteria for the study grant and accommodation supplement introduce unpredictability regarding grant receipt and result in prolonged eligibility checks, which pose barriers for widened access and achieving a good student-to-programme match, particularly for mobile students.	Revise the eligibility criteria for the means-tested grant with the aim of ensuring that the grant system is implementable in a predictable, fair and effective manner.
	Revise the eligibility criteria for the housing supplement with the aim of ensuring that the system is implementable in a predictable, fair and effective manner.
Variations in the funding that institutions allocate to social student support services from their budgets can contribute to differences in the quality of these services across institutions, which can limit their impact on reducing barriers to support student success.	Commission an analysis of the factors that explain variations in the per-student levels of investment in student social action services between public higher education institutions.
Increase the coverage and quality of career advice for secondary education students	
It is positive that career counsellors – in the form of psychologists – are required to be available in all public secondary schools in Portugal and that higher education institutions are actively engaging in student outreach, but it is not clear that the current organisation of information flows and career advice are working in the most effective ways to reach all relevant student groups, which limits the potential to promote access to higher education, student-to-programme match and completion rates.	Improve the access to resources for staff involved in career guidance and vocational development for students in upper secondary education (years 10-12).
	Develop an Educational Community Outreach Programme to organise career advice that occurs outside of secondary education, including higher education outreach activities and community mentoring initiatives.
Support student completion rates at higher education	
Most higher education institutions in Portugal have used short-term funding from the EU's Recovery and Resilience Facility (RRF) funding	Support institutions to improve remediation courses for students to develop subject-specific knowledge and transversal skills necessary

Key findings	Recommendations
to increase the offer of tutoring and mentoring services to their students, but it is unclear whether these programmes will continue as the funding stream ends. Questions remain on which initiatives work well and warrant scaling up, which risks limiting the potential of these initiatives to promote student completion rates widely.	for higher education programme completion by adopting good practice, identifying alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.
	Support institutions to strengthen their offer of mentoring and well-being programmes that have been shown to be effective in promoting student success, identifying alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.
The EU's Recovery and Resilience Facility (RRF) funding has also fuelled a growing momentum for innovation in integrating advanced analytical tools to anticipate and customise in the work to improve student support at the institutional level, but challenges remain in identifying best practices and enabling more institutions to benefit from new digital tools, in order to capitalise on the ongoing innovation to promote completion rates.	Harmonise institutional-level data collection and use on progress, drop-out, and successful completion rates across programmes and higher education institutions, with the long-term aim to consolidate the selection of active tracking models and encourage the adoption of good practice after, identifying alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.
	Encourage the sharing of dedicated IT services across institutions in order to support institutions to develop and maintain their tracking systems, while reducing the duplication of work, identifying alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.

References

Aina, C. et al. (2022), "The determinants of university dropout: A review of the socio-economic literature", *Socio-Economic Planning Sciences*, Vol. 79, https://doi.org/10.1016/j.seps.2021.101102. [88]

Andrews, R., S. Imberman and M. Lovenheim (2020), "Recruiting and supporting low-income, high-achieving students at flagship universities", *Economics of Education Review*, Vol. 74, https://doi.org/10.1016/j.econedurev.2019.101923. [65]

Archer, L. et al. (2012), "Science Aspirations, Capital, and Family Habitus: How Families Shape Children's Engagement and Identification With Science", *American Educational Research Association*, Vol. 49/5, https://doi.org/10.3102/0002831211433290. [80]

Austrian Ministry of Science Research and Economy (2017), *National strategy on the social dimension of higher education: Towards more inclusive access and wider participation*, Austrian Ministry of Science Research and Economy, https://www.sozialerhebung.at/sozdim/strategiepapier/Strategie_2017_englisch.pdf. [13]

Barone, C., M. Triventi and G. Assirelli (2018), "Explaining Social Inequalities in Access to University: A Test of Rational Choice Mechanisms in Italy", *European Sociological Review*, Vol. 34/5, pp. 554-569, https://doi.org/10.1093/esr/jcy028. [58]

Behr, A. and K. Theune (2016), "The causal effect of off-campus work on time to degree", *Education Economics*, Vol. 24/2, pp. 189-209, https://doi.org/10.1080/09645292.2014.974509. [51]

Beine, M., R. Noël and L. Ragot (2014), "Determinants of the international mobility of students", *Economics of Education Review*, Vol. 41, pp. 40-54, https://doi.org/10.1016/j.econedurev.2014.03.003. [42]

Berlingieri, F., A. Diegmann and M. Sprietsma (2023), "Preferred field of study and academic performance", *Economics of Education Review*, Vol. 95, https://doi.org/10.1016/j.econedurev.2023.102409. [90]

Blanden, J., M. Doepke and J. Stuhler (2023), *Chapter 6 - Educational inequality*, Elsevier, https://doi.org/10.1016/bs.hesedu.2022.11.003. [60]

Boudon, R. (1974), *Education, Opportunity, and Social Inequality: Changing Prospects in Western Society.*, Wiley-Interscience, https://eric.ed.gov/?id=ED091493. [2]

Brumley, L., M. Russell and S. Jaffee (2019), "College Expectations Promote College Attendance: Evidence From a Quasiexperimental Sibling Study", *Psychological Science*, Vol. 30/8, https://doi.org/10.1177/0956797619855385. [69]

Buchmann, M., J. Grütter and A. Zuffianò (2021), "Parental educational aspirations and children's academic self-concept: Disentangling state and trait components on their dynamic interplay", *Child Development*, Vol. 93/1, https://doi.org/10.1111/cdev.13645. [79]

Cabrera, A., A. Nora and M. Castañeda (1992), "The role of finances in the persistence process: A structural model", *Research in Higher Education*, Vol. 33/5, pp. 571-593, https://doi.org/10.1007/BF00973759. [48]

Campbell, S. et al. (2022), "Matching in the Dark? Inequalities in Student to Degree Match", *Journal of Labor Economics*, Vol. 40/4, https://doi.org/10.1086/718433. [27]

Canaan, S. and P. Mouganie (2018), "Returns to Education Quality for Low-Skilled Students: Evidence from a Discontinuity", *Journal of Labor Economics*, https://doi.org/10.1086/694468. [38]

Carreira, P. and A. Lopes (2021), "Drivers of academic pathways in higher education: traditional vs. non-traditional students", *Studies in Higher Education*, Vol. 46/7, pp. 1340-1355, https://doi.org/10.1080/03075079.2019.1675621. [50]

Carrell, S. and B. Sacerdote (2017), "Why Do College-Going Interventions Work?", *American Economic Journal: Applied Economics*, Vol. 9/3, https://doi.org/10.1257/app.20150530. [77]

Chetty, R. et al. (2020), "Income Segregation and Intergenerational Mobility Across Colleges in the United States", *The Quarterly Journal of Economics*, Vol. 135/3, https://doi.org/10.1093/qje/qjaa005. [21]

Chowdry, H. et al. (2013), "Widening Participation in Higher Education: Analysis Using Linked Administrative Data", *Journal of the Royal Statistical Society Series A: Statistics in Society*, Vol. 176/2, https://doi.org/10.1111/j.1467-985X.2012.01043.x. [20]

Cingano, F. (2014), "Trends in Income Inequality and its Impact on Economic Growth", *OECD Social, Employment and Migration Working Papers*, OECD Publishing, Paris, https://doi.org/10.1787/5jxrjncwxv6j-en. [68]

Corak, M. (2013), "Income Inequality, Equality of Opportunity, and Intergenerational Mobility", *The Journal of Economic Perspectives*, Vol. 27/3, https://www.jstor.org/stable/41955546. [67]

da Silva, D. et al. (2022), "Forecasting Students Dropout: A UTAD University Study", *Future Internet*, Vol. 14/3, https://doi.org/10.3390/fi14030076. [25]

DeAngelo, L. and R. Franke (2016), "Social Mobility and Reproduction for Whom? College Readiness and First-Year Retention", *American Educational Research Journal*, Vol. 53/6, pp. 1588-1625, https://doi.org/10.3102/0002831216674805. [44]

Delogu, M. et al. (2024), "Predicting dropout from higher education: Evidence from Italy", *Economic Modelling*, Vol. 130, https://doi.org/10.1016/j.econmod.2023.106583. [23]

Dilnot, C., L. Macmillan and G. Wyness (2023), "The path increasingly travelled: Vocational entry qualifications, socioeconomic status and university outcomes", *British Educational Research Journal*, Vol. 49/6, https://doi.org/10.1002/berj.3890. [35]

Dockery, A., P. Koshy and I. Li (2022), "Parental expectations of children's higher education participation in Australia", *British Educational Research Journal*, Vol. 48/4, https://doi.org/10.1002/berj.3786. [81]

Dolton, P., O. Marcenaro and L. Navarro (2003), "The effective use of student time: a stochastic frontier production function case study", *Economics of Education Review*, Vol. 22/6, pp. 547-560, https://doi.org/10.1016/S0272-7757(03)00027-X. [52]

Dynarski, S. (2003), "Does Aid Matter? Measuring the Effect of Student Aid on College Attendance and Completion", *American Economic Review*, Vol. 93/1, pp. 279-288, https://doi.org/10.1257/000282803321455287. [45]

Espinoza, O. et al. (2022), "Reducing inequality in access to university in Chile: the relative contribution of cultural capital and financial aid", *Higher Education*, Vol. 83, pp. 1355-1370, https://doi.org/10.1007/s10734-021-00746-z. [62]

EUR-Lex (2022), *The Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on a European Strategy for Universities*, European Union, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2022%3A16%3AFIN. [8]

EUR-Lex (2017), *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on a renewed EU agenda for higher education*, European Union, https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1496304694958&uri=COM%3A2017%3A247%3AFIN. [15]

European Commission (2024), *European Pillar of Social Rights - Building a fairer and more inclusive European Union*, https://ec.europa.eu/social/main.jsp?catId=1226&langId=en. [6]

European Commission (2024), *Inclusive education*, https://education.ec.europa.eu/focus-topics/improving-quality/inclusive-education. [5]

European Commission (2020), *Beyond averages: Fairness in an economy that works for people*, Joint Research Centre, European Commission, https://doi.org/10.2760/261169. [33]

European Commission (2020), *The European higher Education Areas in 2020: Bologna Process Implementation Report*, Publications Office of the European Union, https://doi.org/10.2797/756192. [7]

European Commission (n.d.), *European Social Fund Plus*, https://european-social-fund-plus.ec.europa.eu/en. [16]

European Commission (n.d.), *Pillar overview*, https://ec.europa.eu/economy_finance/recovery-and-resilience-scoreboard/pillar_overview.html?lang=en. [17]

Eurydice (2024), *The European Higher Education Area in 2024: Bologna Process Implementation Report*, Eurydice, https://eurydice.eacea.ec.europa.eu/publications/european-higher-education-area-2024-bologna-process-implementation-report. [12]

Fack, G. and J. Grenet (2015), "Improving College Access and Success for Low-Income Students: Evidence from a Large Need-Based Grant Program", *American Economic Journal: Applied Economics*, Vol. 7/2, pp. 1-34, https://doi.org/10.1257/app.20130423. [47]

Ferrão, M. and L. Almeida (2019), "Differential effect of university entrance score on first-year students' academic performance in Portugal", *Assessment & Evaluation in Higher Education*, Vol. 44/4, pp. 610-622, https://doi.org/10.1080/02602938.2018.1525602. [91]

Gijón, J. et al. (2023), "Dropout stories of Andalusian university students", *Frontiers in Education*, Vol. 8, https://doi.org/10.3389/feduc.2023.1130194. [87]

Godin, M. and J. Hindriks (2018), "An international comparison of school systems based on social mobility", *LIDAM Reprints CORE 2951, Université catholique de Louvain, Center for Operations Research and Econometrics (CORE)*, https://www.insee.fr/en/statistiques/fichier/3546955/499_Godin-Hindriks-EN.pdf. [32]

Goldrick-Rab, S., D. Harris and P. Trostel (2009), "Why Financial Aid Matters (or Does Not) for College Success: Toward a New Interdisciplinary Perspective", https://doi.org/10.1007/978-1-4020-9628-0_1. [49]

Goldthorpe, J. (2010), "Class analysis and the reorientation of class theory: the case of persisting differentials in educational attainment. 1996", *The British Journal of Sociology*, Vol. 61/1, pp. 311-335, https://doi.org/10.1111/j.1468-4446.2009.01248.x. [85]

Gonzalez-Nucamendi, A., J. Noguez and L. Neri (2023), "Predictive analytics study to determine undergraduate students at risk of dropout", *Frontiers in Education*, https://doi.org/10.3389/feduc.2023.1244686. [24]

Guyon, N. and E. Huillery (2020), "Biased aspirations and social inequality at school: evidence from French teenagers", *The Economic Journal*, Vol. 131/February, https://doi.org/10.1093/ej/ueaa077. [70]

Hamilton, L. (2013), "More Is More or More Is Less? Parental Financial Investments during College", *American Sociological Review*, Vol. 78/1, pp. 70-95, https://doi.org/10.1177/0003122412472680. [43]

Hanushek, E., S. Machin and L. Woessmann (eds.) (2016), *Chapter 1 - Behavioral Economics of Education: Progress and Possibilities*, Elsevier, https://doi.org/10.1016/B978-0-444-63459-7.00001-4. [74]

Hoxby, C. and C. Avery (2013), "The Missing "One-Offs": The Hidden Supply of High-Achieving, Low Income Students", *Brookings Papers on Economic Activity*, https://www.brookings.edu/wp-content/uploads/2016/07/2013a_hoxby.pdf. [28]

Hoxby, C. and S. Turner (2015), "What High-Achieving Low-Income Students Know About College", *American Economic Review: Papers & Proceedings*, Vol. 105/5, https://doi.org/10.1257/aer.p20151027. [83]

Hoxby, C. and S. Turner (2013), "Expanding College Opportunities for High-Achieving, Low-Income Students", *Stanford SIEPR Working Paper*, https://siepr.stanford.edu/publications/working-paper/expanding-college-opportunities-high-achieving-low-income-students. [76]

Huebener, M. (2012), "The Role of Family Risk Attitudes in Education and Intergenerational Mobility: An Empirical Analysis", *SOEPpaper No. 529*, https://doi.org/10.2139/ssrn.2197844. [61]

Joensen, J. and E. Mattana (2021), "Student Aid Design, Academic Achievement, and Labor Market Behavior: Grants or Loans?", *SSRN*, https://doi.org/10.2139/ssrn.3028295. [40]

Kim, D. (2007), "The Effect of Loans on Students' Degree Attainment: Differences by Student and Institutional Characteristics", *Harvard Educational Review*, Vol. 77/1, pp. 64-100, https://doi.org/10.17763/haer.77.1.n14t69l0q8292784. [54]

Konijn, S., D. Visser and M. Zumbuehl (2023), "Quantifying the Non-Take-up of a Need-Based Student Grant in the Netherlands", *De Economist* 171, pp. 239-266, https://doi.org/10.1007/s10645-023-09423-1. [63]

Lassibille, G. and M. Navarro Gómez (2011), "How Long Does it Take to Earn a Higher Education Degree in Spain?", *Research in Higher Education*, Vol. 52/1, pp. 63-80, https://doi.org/10.1007/s11162-010-9186-z. [53]

Lekfuangfu, W. and R. Odermatt (2022), "All I have to do is dream? The role of aspirations in intergenerational mobility and well-being", *European Economic Review*, Vol. 148, https://doi.org/10.1016/j.euroecorev.2022.104193. [78]

Lergetporer, P., K. Werner and L. Woessmann (2021), "Does Ignorance of Economic Returns and Costs Explain the Educational Aspiration Gap? Representative Evidence from Adults and Adolescents", *Economica*, Vol. 88/351, pp. 624-670, https://doi.org/10.1111/ecca.12371. [72]

Lovenheim, M. and C. Reynolds (2012), "The Effect of Housing Wealth on College Choice: Evidence from the Housing Boom", *NBER Working Paper No. 18075*, https://www.nber.org/system/files/working_papers/w18075/w18075.pdf. [41]

Lovenheim, M. and J. Smith (2023), *Chapter 4 - Returns to different postsecondary investments: Institution type, academic programs, and credentials*, Elsevier, https://doi.org/10.1016/bs.hesedu.2022.11.006. [64]

Mann, A., E. Kashefpakdel and C. Percy (2017), "Socialised social capital? The capacity of schools to use careers provision to compensate for social capital deficiencies among teenagers", in *Essays on Employer Engagement*, Routledge, London, https://doi.org/10.1080/13639080.2016.1177636. [59]

Marginson, S. (2016), "High Participation Systems of Higher Education", *The Journal of Higher Education*, Vol. 87/2, pp. 243-271, https://doi.org/10.1080/00221546.2016.11777401. [4]

OECD (2025), "Education equity", https://www.oecd.org/en/topics/education-equity.html (accessed on 2025). [1]

OECD (2024), *Education at a Glance 2024: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/c00cad36-en. [36]

OECD (2024), *OECD Youth Policy Toolkit*, OECD Publishing, Paris, https://doi.org/10.1787/74b6f8f3-en. [18]

OECD (2023), *Education at a Glance 2023: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/e13bef63-en. [19]

OECD (2023), *PISA 2022 Results (Volume I): The State of Learning and Equity in Education*, OECD Publishing, Paris, https://doi.org/10.1787/53f23881-en. [26]

OECD (2022), *Education at a Glance 2022: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/3197152b-en. [34]

OECD (2021), *Education at a Glance 2021: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/b35a14e5-en. [30]

OECD (2020), *Resourcing Higher Education: Challenges, Choices and Consequences*, OECD Publishing, Paris, https://doi.org/10.1787/735e1f44-en. [3]

OECD (2019), *PISA 2018 Results (Volume II)*, OECD Publishing, Paris, https://www.oecd-ilibrary.org/sites/31156087-en/index.html?itemId=/content/component/31156087-en. [73]

OECD Legal Instruments (2022), *Declaration on Building Equitable Societies Through Education*, OECD Publishing, Paris, https://legalinstruments.oecd.org/en/instruments/OECD-LEGAL-0485. [10]

OECD Legal Instruments (2022), *Recommendation of the Council on Creating Better Opportunities for Young People*, OECD Publishing, Paris, https://legalinstruments.oecd.org/en/instruments/OECD-LEGAL-0474. [9]

Oppedisano, V. (2011), "The (adverse) effects of expanding higher education: Evidence from Italy", *Economics of Education Review*, Vol. 30/5, pp. 997-1008, https://doi.org/10.1016/j.econedurev.2011.04.010. [56]

Outreville, J. (2015), "The Relationship between relative risk aversion and the level of education: a survey and implications for the demand for life insurance", *Journal of Economic Surveys*, Vol. 29/1, pp. 97-111, https://doi.org/10.1111/joes.12050. [57]

Park, E. and S. Preymann (2022), *Zwischenevaluierung der Nationalen Strategie zur sozialen Dimension in der Hochschulbildung*, https://pubshop.bmb.gv.at/index.php?rex_media_type=pubshop_download&rex_media_file=strategie_sd_hsbildung.pdf. [14]

Prior, L. and G. Leckie (2023), "School differences on whether and where students apply to university", *British Journal of Sociology of Education*, Vol. 44/7, pp. 1161-1181, https://doi.org/10.1080/01425692.2023.2244177. [82]

Salverda, W., B. Nolan and T. Smeeding (eds.) (2009), *Intergenerational income mobility and the role of family background*, Oxford University Press USA. [66]

Schmidt, B., P. Boero and J. Méndez Vera (2023), "Factors influencing university dropouts: the case of a Chilean state university", *Revista Portuguesa de Educacao*, Vol. 36/1, https://doi.org/10.21814/RPE.23401. [22]

Schmidt, N. and H. Onita (2023), *Principles, Guidelines and Indicators to Strengthen the Social Dimension of Higher Education in the European Higher Education Area*, BFUG Working Group on Social Dimension, https://www.ehea.info/Upload/BFUG_ES_GA_86_6_4_1_WG_SD_Principles_Guidelines_Indicators.pdf. [11]

Schüle, P. (2023), "Career Preferences and Socio-Economic Background", *ifo Working Paper No. 395*, https://www.ifo.de/en/publications/2023/working-paper/career-preferences-and-socio-economic-background. [71]

Scott-Clayton, J. (2011), "On money and motivation: A quasi-experimental analysis of financial incentives for college achievement", *Journal of Human Resources*, Vol. 46/3, pp. 614-646, https://doi.org/10.3368/jhr.46.3.614. [75]

Shure, N. and L. Zierow (2023), "High Achieving First-Generation University Students", *IZA Discussion Paper No. 16654*, https://doi.org/10.2139/ssrn.4656843. [84]

Singell, L. (2004), "Come and stay a while: does financial aid effect retention conditioned on enrollment at a large public university?", *Economics of Education Review*, Vol. 23/5, pp. 459-471, https://doi.org/10.1016/j.econedurev.2003.10.006. [46]

Steiner, V. and K. Wrohlich (2012), "Financial Student Aid and Enrollment into Higher Education: New Evidence from Germany", *Scandinavian Journal of Economics*, Vol. 114/1, pp. 124-147, https://www.jstor.org/stable/41407779. [39]

Suga, F. (2019), “Returns to Postgraduate Education in Japan”, *The Japanese Economic Review*, https://doi.org/10.1111/jere.12227. [37]

Thomas, L. (2002), “Student retention in higher education: the role of institutional habitus”, *Journal of Education Policy*, Vol. 17/4, pp. 423-442, https://doi.org/10.1080/02680930210140257. [55]

Urbina-Nájera, A., J. Camino-Hampshire and B. Cruz (2020), “University dropout: Prevention patterns through the application of educational data mining”, *RELIEVE - Revista Electronica de Investigacion y Evaluacion Educativa*, Vol. 26/1, pp. 1-19, https://doi.org/10.7203/relieve.26.1.16061. [89]

Werfhorst, H. (2021), “Sorting or mixing? Multi-track and single-track schools and social inequalities in a differentiated educational system”, *British Educational Research Journal*, Vol. 47/5, pp. 1209-1236, https://doi.org/10.1002/berj.3722. [31]

Werfhorst, H. and S. Hofstede (2007), “Cultural capital or relative risk aversion? Two mechanisms for educational inequality compared”, *The British Journal of Sociology*, Vol. 58/3, https://doi.org/10.1111/j.1468-4446.2007.00157.x. [86]

Zwier, D., S. Geven and H. Werfhorst (2021), “Social inequality in shadow education: The role of high-stakes testing”, *International Journal of Comparative Sociology*, Vol. 61/6, https://doi.org/10.1177/0020715220984500. [29]

2 Current inequities in higher education participation in Portugal

This chapter takes stock of outcomes in the Portuguese higher education system related to access and completion, including in the most selective programmes. It provides an overview of educational pathways of young people from lower-income backgrounds in Portugal relative to their higher-income peers. It also considers the division of students from different income backgrounds between universities and polytechnic institutions and explains differences in competition for study places across geographical districts.

2.1. Introduction and key findings

Following a considerable increase in participation in higher education over the last two decades, Portugal has largely closed the historic gap in higher education attainment rates that existed with its peers in the European Union (EU) and the OECD. Since the democratic revolution in 1974, sustained political and stakeholder commitment, combined with a strong research community, have supported the development and implementation of a range of successful policies to promote widened access to advanced educational opportunities. The country is well placed to build on this legacy to tackle remaining inequities in a system in which – as in many other developed economies – educational attainment remains strongly correlated with socio-economic background.

This report explores how Portugal can increase access to, and completion of, higher education among students from socio-economically disadvantaged backgrounds with high academic potential, including in selective study programmes. The objective of promoting greater equity in higher education reflects a twin aim of engaging historically under-represented groups in higher education to enhance their life chances and ensuring that underlying talent and potential, rather than socio-economic background, is the primary criterion for securing a place in the most selective – and prestigious – higher education programmes in Portugal (MCTES, 2024[1]).

The policy aims of the project are widely considered to be an important issue among Portuguese stakeholders, as illustrated by responses to a stakeholder survey conducted as part of this project. While not aiming to be representative of the sector, the stakeholder survey targeted individuals working to support students' access and progression in the education sector in Portugal. Around nine-in-ten survey respondents agreed that it is important to increase the percentage of low-income students attending higher education programmes.

This chapter first considers changes in higher education attainment in Portugal over the past decade and takes stock of current patterns of participation in higher education in terms of students' family income levels. It subsequently explains patterns of accessing the most selective "programmes of excellence" and variations in levels of competition across geographical districts. Finally, the chapter provides an overview of programme completion rates for students from different income backgrounds in Portugal.

Key findings

Despite exhibiting more inequality in access to resources, Portugal has experienced greater increases in higher education attainment for 25-34 year-olds than in other OECD jurisdictions in the past decade, with attainment rising by 12 percentage points between 2014 and 2024, compared with 7 percentage points on average across OECD member countries. However, the attainment rate for this age group has fallen in recent years, to 43% in 2024, down from a peak of 46% in 2021. As such, the observed rate remains below the EU 27 average in 2024 (44%) and the EU-level target of 45% for 2030.

Even so, lower-income students, defined as students who received support via School Social Action (Ação Social Escolar, ASE) in secondary education for the purposes of this report, are less likely than higher-income students who did not receive ASE to transition into higher education. Across Portugal, 48% of lower-income students enrol in higher education in the year following their graduation from secondary education, compared with 57% of higher-income students.

Lower-income students are less likely to enrol in the most selective programmes, requiring an entry grade of 17/20 or above, referred to as "programmes of excellence", and more likely to enrol in the more geographically dispersed polytechnic institutes than higher-income students.

While the share of mobile students out of students enrolled in all cycles of study has increased from 25% in 2014 to 33% in 2023, the observed preference is to only move to districts where programmes are more competitive than the home district. At the same time, divergences between the supply of public study places and student demand for them mean that competition for study places is fierce in some geographical areas (notably the north and the Lisbon Metropolitan Area), which means that young people living in these areas and who have less competitive entry grades struggle to access the local public offer.

Internationally comparable data on student success indicate that completion rates in Portugal are broadly in line with the average across the OECD member countries when considering completion within the theoretical duration of the programme plus three years. However, Portugal stands out in exhibiting a higher likelihood of dropping out later on in programmes, compared with many other OECD member countries. While further analysis is needed to understand the demographic profiles of students who do not complete their programmes on time, initial evidence from Portugal suggests that lower-income students do not have higher drop-out rates than higher-income students when students enrol in similar programmes and via the same entry routes.

2.2. Despite widened access, students from lower-income backgrounds still risk missing out on important educational opportunities in Portugal

Even though access to higher education has widened significantly over the past decade in Portugal, socio-economic gaps in participation and attainment prevail.[1] Lower-income students remain less likely than higher-income students to attend higher education programmes, and comparatively few enter and complete the most selective courses in the country.

2.2.1. Current inequalities in access to resources are greater in Portugal than on average in OECD member countries

Inequity in individuals' opportunities to participate in higher education occurs when outcomes in education depend not only on the individual student's talent and effort, but also on contextual factors such as parental income, parental educational attainment, or the geographical area in which the student grows up. Promoting equity in educational opportunities therefore involves addressing the role of such contextual factors in determining the opportunities that students have open to them.

The phenomenon of an inter-generational transmission of education – that is, the trend that parents with higher levels of education are more likely to have highly-educated children than parents with lower levels of education – is well-established in international research (Blanden, Doepke and Stuhler, 2023[2]; Hanushek et al., 2022[3]; Crawford, Macmillan and Vignoles, 2017[4]). For example, Collado, Ortuño-Ortín and Stuhler (2023[5]) find evidence of the transmission of educational advantage within extended families across generations in Sweden that cannot be explained by the genes inherited from parents, by considering the transmission of advantage across non-blood relatives. In France, an increment of 10 percentiles in the parental income distribution is associated with a 5.6 percentage-point increase in the proportion of students enrolling in higher education (Bonneau and Grobon, 2022[6]). Evidence from Germany even suggests that grandparents' level of education is significant in influencing students' access to schooling today (Braun and Stuhler, 2018[7]).

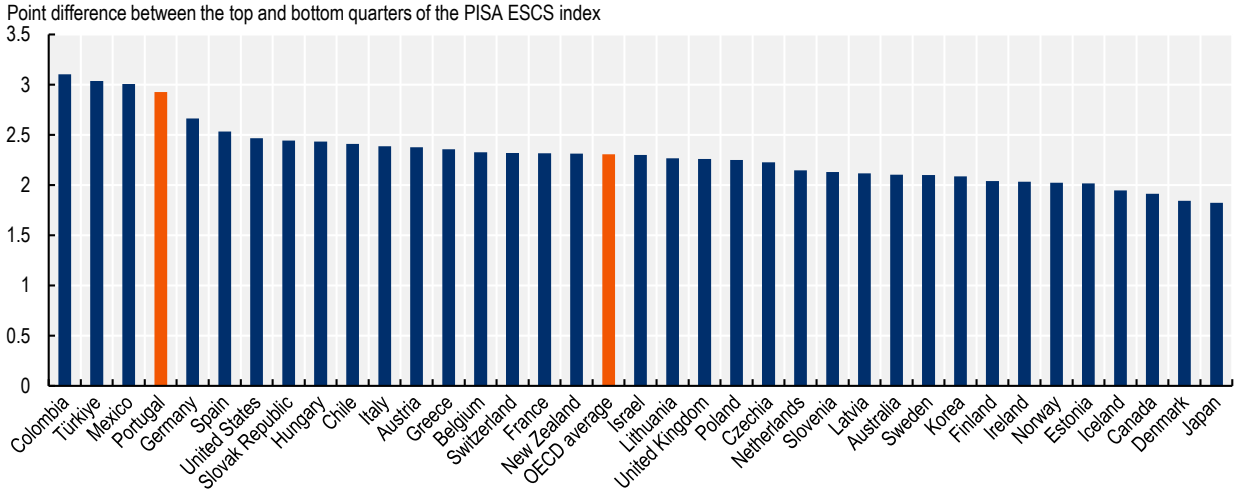
The ability of children to surpass their parents' socio-economic status – that is, to break the inter-generational transmission of education and be upwardly socially mobile – tends to be lower in societies with greater levels

of underlying inequalities. As such, different measures of underlying inequalities can provide a greater understanding of the policy context.

In Portugal, inequalities in students' access to resources tend to be greater than on average across the OECD member countries. PISA includes information about students' economic, social and cultural status (ESCS), and consolidates this information in a composite ESCS index. The ESCS index combines information on the highest level of parental education, the highest level of parental occupational status and home possessions as a proxy for family wealth (OECD, 2022[8]). The point difference between the mean score in the top and bottom quarters of the index indicates the level of socio-economic inequality in a country. As seen in Figure 2.1, socio-economic inequality measured using the ESCS index is greater in Portugal than across OECD member countries, and only higher in Colombia, Türkiye, and Mexico.

Figure 2.1. There are relatively large differences in students' socio-economic status in Portugal

Difference in index point means between the top and bottom quarters of students' socio-economic status as measured by the PISA index of Economic, Social, and Cultural Status (ESCS), 2022



Note: The PISA index of socio-economic status (ESCS) is an average of three indices based on student reports: parental educational attainment (in years), parental occupational status on the "International Socio-Economic Index" (ISEI) scale, and an index of "household possessions", derived using item-response-theory (IRT) models. Differences are statistically significant. Data for Costa Rica are missing. Countries are ranked in descending order of point difference. Because one or more PISA sampling standards were not met, caution is required when interpreting estimates from United States, New Zealand, United Kingdom, Latvia, Netherlands, Australia, Ireland, Canada, and Denmark (see Reader's Guide, Annexes A2 and A4, PISA 2022 Results (Volume I) (OECD, 2023[9])).
Source: Table I.B1.4.2, PISA (2023[9]), OECD.

2.2.2. Efforts to widen participation have borne fruit in the past decade

Governments in Portugal have made repeated commitments to widen participation and improve the accessibility to higher education for historically under-represented groups (Conselho Nacional de Educação, 2024[10]; Teixeira et al., 2022[11]; European Commission, 2023[12]). The Portuguese Education and Training 2020 Strategic Framework set the target of increasing the share of 30–34 year-olds with tertiary education to 40% by 2020, to align with the EU's 2020 strategy for growth and jobs (DGES, 2009[13]).[2] Subsequently, in Portugal's national development strategy, the Portugal 2030 Programme, published in 2018, the government set the more ambitious target of increasing the share of 30-34 year-olds with tertiary attainment to 50% by 2030 in line with the Partnership Agreement between Portugal and the European Commission and the EU objectives towards a European Education Area (DGES, 2018[14]; Portugal2030[15]).

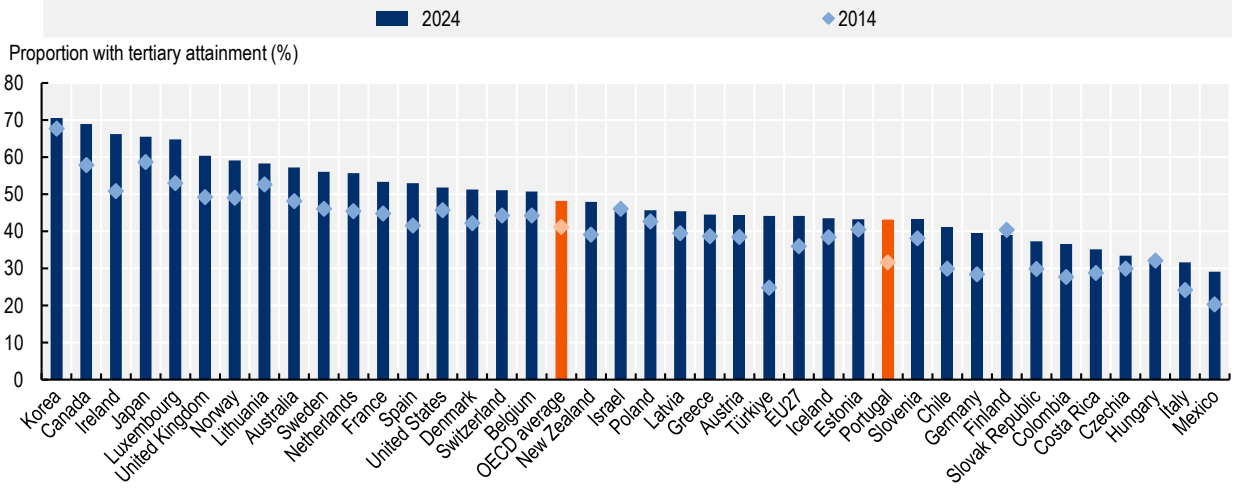
The priority placed on improving the inclusiveness of higher education in Portugal is also expressed in the National Plan against Racism and Discrimination. In 2023, the government reviewed the national access system for higher education with one of the major goals being to increase its equity and improve the participation of vulnerable and under-represented groups. Moreover, increasing the qualification and skills levels of the youth population and tackling social inequalities in, and through, education are core priorities of the "Qualifications and Skills" strand of Portugal's EU-funded Recovery and Resilience Plan (RRP) (RecuperarPortugal, 2024[16]). Similarly, the National Education Council (*Conselho Nacional de Educação*, CNE) has argued that access to higher education based on equal opportunities is an essential instrument for the construction of a democratic society, and often a condition for personal and professional fulfilment (Conselho Nacional de Educação, 2017[17]).

Efforts to widen participation have borne fruit: tertiary attainment among 25-34 year-olds has increased more in Portugal than across the OECD member countries on average. According to OECD data, tertiary attainment in Portugal increased by 12 percentage points in the past decade, from 32% in 2014 to 43% in 2024, slightly below the EU27 average in 2024 (44%) and below the EU-level target for 2030 (45%) (Figure 2.2) (European Union, 2021[18]). This increase can be compared with a smaller increase in attainment across OECD member countries, with average attainment rates among young people rising by just 7 percentage points, from 41% to 48% between 2014 and 2024 (Figure 2.2).

While the attainment levels in Portugal have increased over the whole period 2013-2023, the country experienced a slight fall in the proportion of higher education graduates among 25-34 year-olds in recent years, down from a peak of 46% in 2021. It is possible that the policies put in place to combat the COVID-19 pandemic, including a shift to mass online instruction in 2020 and 2021, contributed to this phenomenon, and it remains to be seen whether attainment rates will recover in 2024 and 2025.

Figure 2.2. Higher education attainment rates have increased in Portugal in the past decade

Proportion of 25-34 year-olds with tertiary attainment, 2014 and 2024 (or latest year)



Note: Instead of 2024, data refer to 2023 for Iceland, Japan and the United States, and to 2022 for Chile. Instead of 2014, data refer to 2015 for Chile.
Source: OECD Data Explorer.

There are considerable differences in rates of educational attainment across Portugal. For instance, tertiary attainment among 25–34 year-olds in 2024 ranged from 22% in the Azores to 53% in the Lisbon Metropolitan Area (Eurostat, 2025[19]). 50% of young people in cities have completed tertiary education, while 40% have

done so in towns and suburbs and 31% have done so in rural areas (Eurostat, 2025[20]).[3] As this report will explore, regional attainment rates are not directly related to regional transition rates between secondary education and higher education; the high attainment rates in urban areas will be influenced also by the urban concentration of labour market opportunities for graduates.

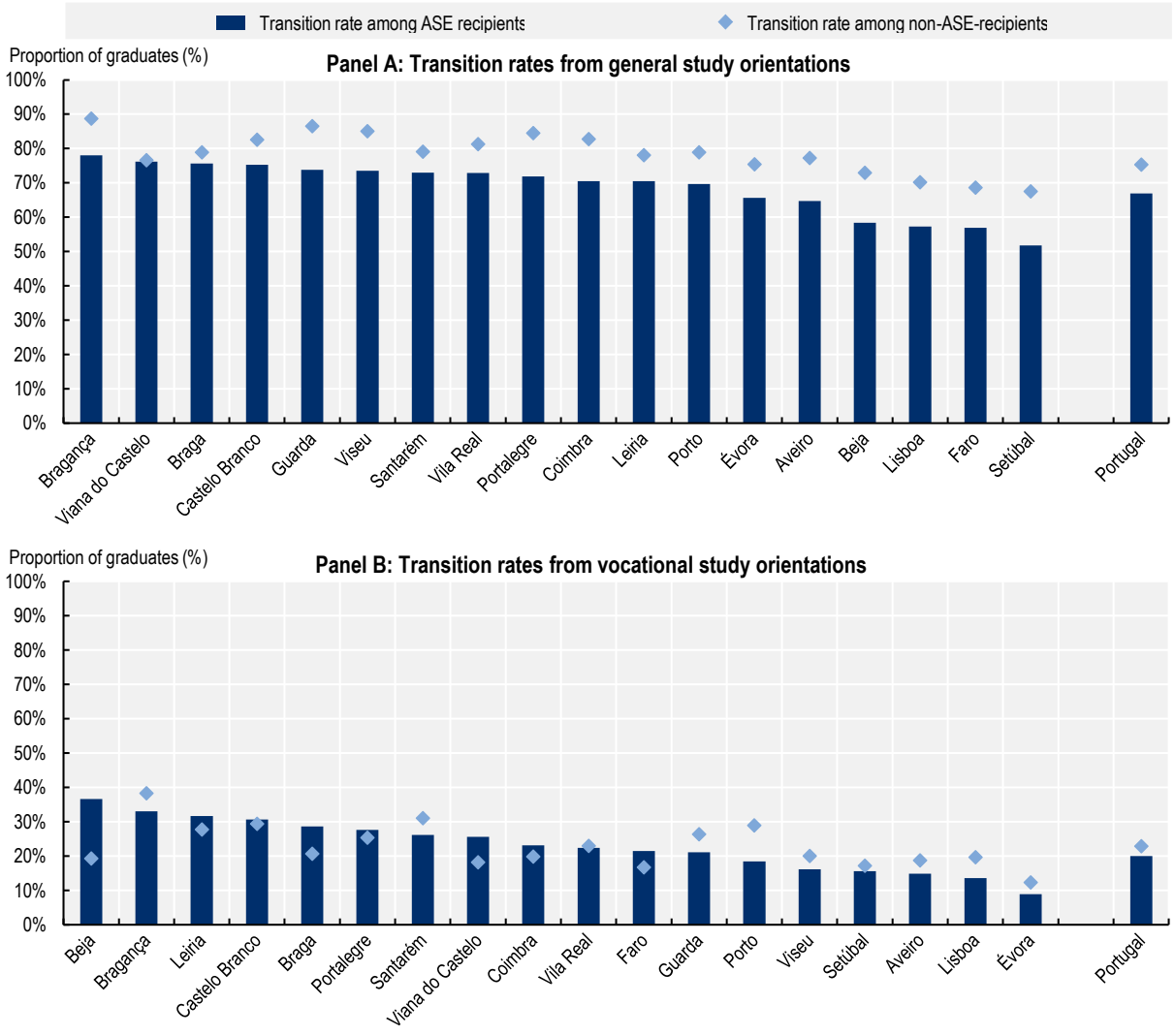
2.2.3. Transition to higher education in Portugal is still influenced by parental income

Lower-income students in Portugal tend to be less likely than their higher-income peers to enrol in higher education. Across Portugal, bespoke tables from the Portuguese Directorate-General for Statistics of Education and Science (*Direção-Geral de Estatísticas da Educação e Ciência*, DGEEC) [4] indicate that 48% of lower-income students, defined as those who receive School Social Action support grants (*Ação Social Escolar*, ASE) (see Box 2.1) in secondary education, move on to enrol in higher education in the following year.[5] By comparison, a majority – 57% – of higher-income students, who do not receive ASE, transition to higher education (Figure 2.3).

It is possible to zoom in on the group of students receiving ASE financial support to see a within-group income gradient. Students in ASE eligibility bracket A, whose families have the lowest incomes, also have lower transition rates to higher education (41%) than students in ASE eligibility bracket B (52%) and in eligibility bracket C (57%), according to bespoke tables from DGEEC.

Figure 2.3. Lower-income students are less likely than their better-off peers to enrol in higher education in Portugal overall

Transition rates from secondary education to higher education for students in general study orientations (Panel A) and vocational study orientations (Panel B), by access to School Social Action (ASE eligibility in brackets A, B, or C) and the district of the parental home, 2023/24

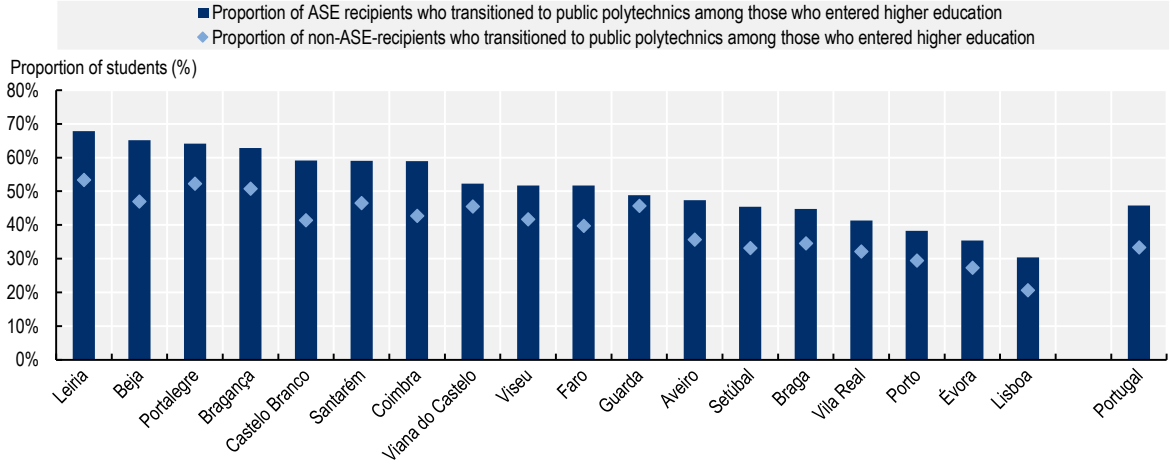


Note: Transition rates are proxied by the number of students enrolling in higher education the first time, in the first year in 2023/2024, as a proportion of secondary education in 2022/2023. Data only include students in general or vocational programmes: students are considered to be in a) general study orientations if they take part in scientific-humanistic courses; b) vocational study orientations if they take part in courses of double certification (including technological courses, vocational courses (*cursos profissionais*), learning courses (*cursos de aprendizagem*), specialised artistic courses (*cursos artísticos especializados*). Students in recurrent education (*ensino recorrente*) are excluded. Students are registered as having transitioned if they are enrolled in higher education in the year following leaving secondary education and enrolled in a preparatory undergraduate degree, undergraduate degree, short-cycle programmes (CTeSPs), preparatory integrated-master degree, or integrated master (see Box 2.3). Data refer to students who enrolled in higher education in the first year for the first time. These bespoke data were provided by special request to DGEEC and are not directly comparable with published tables. The bespoke tables use the datasets Education Statistics (EE) from 2022/2023 and Survey on the Registration of Enrolled and Graduated Higher Education Students (RAIDES) from 2023/2024 (students enrolling in the first year for the first time). This is different from the official statistics from DGEEC.
Source: Bespoke tables provided by DGEEC, based on EE 2022/23; RAIDES 2023/24.

There are differences in the types of institutions attended by students who enrol in higher education. Lower-income students are more likely to enrol in public polytechnics than higher-income students, according to bespoke tables provided by DGEEC. Out of the ASE recipients transitioning to higher education directly from secondary education in 2022/23, 46% enrolled in public polytechnic institutes, compared to just 33% of non-recipient students. The gap is largest in Beja, in the south of the country, where 65% of lower-income students enrolled in public polytechnic institutes, compared to just 47% of non-recipients of social action support, constituting an 18-percentage-point gap (Figure 2.4). A gap remains even if only students from general study orientations are considered (with 41% of ASE recipients enrolling in public polytechnics across the country, compared with 29% non-recipients). This illustrates that lower-income students tend to sort into polytechnic institutes more often than higher-income students, even in local areas where both institution types have a presence.

Figure 2.4. Lower-income students are more likely to enrol in polytechnics than higher-income students in Portugal overall

Proportion of secondary education graduates transitioning to higher education who enrol in public polytechnic institutes, by access to School Social Action (ASE) and the district of the parental home, 2023/24



Note: Data only include students in general or vocational programmes: students are considered to be in a) general study orientations if they take part in scientific-humanistic courses; b) vocational study orientations if they take part in courses of double certification (including technological courses, vocational courses (*cursos profissionais*), learning courses (*cursos de aprendizagem*), specialised artistic courses (*cursos artísticos especializados*). Students in recurrent education (*ensino recorrente*) are excluded. Students are registered as having transitioned if they are enrolled in higher education in the year following leaving secondary education and enrolled in a preparatory undergraduate degree, undergraduate degree, short-cycle programmes (CTeSPs), preparatory integrated-master degree, or integrated master (see Box 2.3). Data refer to students who enrolled in higher education in the first year for the first time. These bespoke data were provided by special request to DGEEC and are not directly comparable with published tables. The bespoke tables use the datasets EE from 2022/2023 and RAIDES from 2023/2024 (students enrolling in the first year for the first time). This is different from the official statistics from DGEEC.
Source: Bespoke tables provided by DGEEC, based on EE 2022/23; RAIDES 2023/2024.

Box 2.1. What is School Social Action in Portugal?

School Social Action, or Ação Social Escolar (ASE), is a means-tested, state-funded benefit targeting families with children in secondary education. It aims to prevent social exclusion, reduce early school leaving, and promote educational success. Three levels of support are available depending on family income, where recipients in ASE eligibility bracket A receive the most support and recipients of ASE eligibility bracket C receive the least support. Family income brackets for ASE align with income brackets for family benefits (Abono de família para crianças e jovens) and are annually adjusted according to Social Support Index (IAS) (see Chapter 4).

In 2022/23, 27% of students in public secondary education across continental Portugal received ASE. Out of these students, 11% received ASE A, a little over 12% received ASE B and 4% received ASE C. There are differences in the share of recipients across study orientations. In general programmes, 24% received ASE in any bracket, whereas over 36% of students in vocational study orientations received ASE in any bracket.

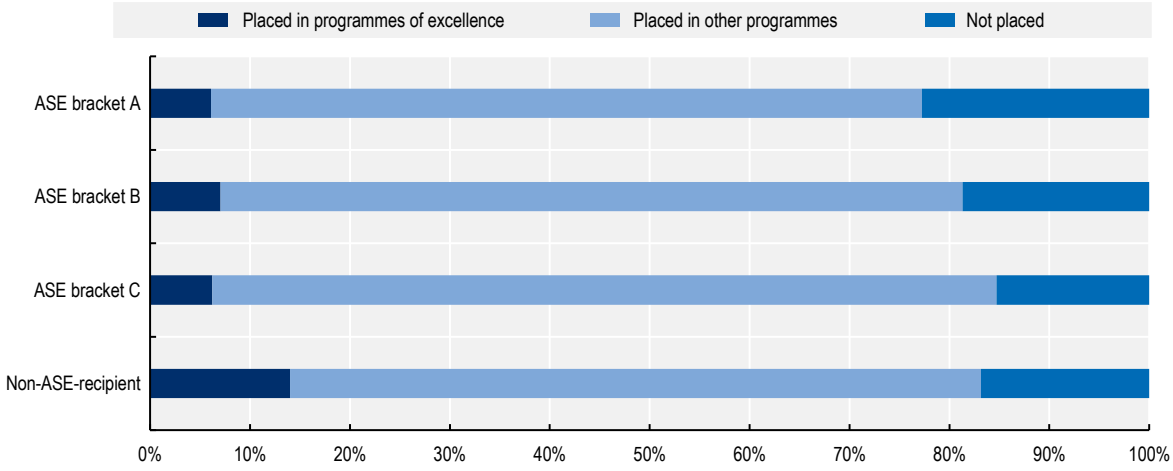
Source: Caixa Geral de Depósitos (2023[21]); Observatório das desigualdades (Observatório das desigualdades, 2025[22]).

2.2.4. Lower-income students are less likely to access the most competitive courses

To understand the level of equity in educational opportunities, it is important to not only consider the likelihood of transitioning into higher education, but also the chance of accessing the most sought-after programmes. In Portugal, lower-income students are less likely than higher-income to access the highly competitive “programmes of excellence”. Programmes gain this epithet if all students admitted in the first admissions phase of the National Access Competition had average grades equal to or above 17 (out of 20 possible) (for more on the National Access Competition, see Box 3.1). In 2022/23, just 6% of ASE recipients who applied for higher education through the National Access Competition were placed in a programme of excellence, compared to 14% of students who did not receive ASE (Figure 2.5).

Figure 2.5. Fewer lower- than higher-income students make it to the most selective programmes

Distribution of secondary education students applying for the National Access Competition, by result obtained in the National Access Competition and by eligibility bracket for School Social Action (ASE), 2022/23



Note: An establishment/course pair is considered a programme of excellence if the entry grade of the last person placed in the first phase is equal to or greater than 17.0 points.
Source: MCTES (2024[11]), based on ENES, DGEEC.

While some of this under-representation in the most selective programmes is part of a systematic under-representation of lower-income students in higher education discussed in the following chapters, it is also part of a wider trend of poor matching between students' grades and the relative competitiveness of the programmes they enter. Even when low-income students have the secondary education grades to enter selective higher education programmes, they tend to enter programmes that are less selective than their grades would allow (see Chapter 3 for an in-depth discussion). This is important because more selective programmes are typically assumed to be of higher quality because of the characteristics of the institutions and academics providing them and the cohort effects generated by attracting multiple high-performing students to the same study group. If talented individuals from low-income backgrounds with the potential to access these programmes fail to do so, it means that they miss out on the education and career benefits associated with the programmes and the capacity of the education system to drive social mobility and broader access to opportunity is reduced.

Research from Portugal finds that students from lower socio-economic backgrounds are less well-matched to the programmes they enter than students from higher socio-economic backgrounds. Murphy and Silva (2024[23]) investigate the degree of match between the quality of a student – based on the performance in national entry exams of the student – and the presumed quality of the programme – based on the performance in national entry exam of students who applied and enrolled in the programme. Controlling for observable factors including entry exam grades, they find that students who are the first in their families to attend higher education match to lower-quality degrees compared to students with at least one parent who has attained some higher education. Indeed, the authors find that students who are the first in their family to attend higher education enrol in less selective programmes than they could access (undermatch) regardless of their entry exam grades (Murphy and Silva, 2024[23]).

Portugal is joined by other countries in facing issues of mismatch between the talents of under-represented students and the status of the higher education programmes they enter. For instance, Campbell et al. (2019[24]) find that students in the United Kingdom with low socio-economic status systematically "undermatch" on university programme choice. This finding holds when the authors consider quality of higher education programmes to be proxied by both the median grade in programmes and the median potential

earnings of students in the programme. Campbell et al. (2022[25]) also find that the student-to-programme mismatch is greatest between the 70th and 90th percentiles of achievement.

2.3. Access to higher education while remaining in the parental home varies by geographical location

Portugal has a tradition of providing geographically accessible higher education by ensuring that institutions are strategically located in regional centres across the country and controlling the number of study places that are available in different locations. This helps ensure that higher education programmes are offered in all districts across Portugal. The provision of higher education opportunities outside metropolitan and urban areas is an important vehicle for widened access to students who are not willing or able to move away from their local area to attend a programme. At the same time, relatively high levels of competition in the Lisbon Metropolitan area and in northern districts raise barriers to access local programmes.

2.3.1. Public polytechnics are more geographically dispersed than public universities

Ensuring that individuals in all regions have access to a higher education institution has been an explicit policy goal in Portugal since the late 1970s. Portugal has a long track record of managing a long-term expansion of higher education provision through policies designed to promote territorial cohesion with demand for higher education surging after the democratic revolution in 1974. To control quality and ensure territorial balance through the long period of expansion, Portugal established a system of *numerus clausus* in 1977 (MCTES, 2024[1]). This system ensures that the number of higher education study places in each programme – or institution and programme pair – is fixed annually by the government respecting the maximum limit of admissions set by the Agency for Assessment and Accreditation of Higher Education (A3ES) (although institutions retain a certain degree of freedom to limit the number of study places in case of resource constraints) (see Box 2.2).

Box 2.2. The number of available study places is set through a system of *numerus clausus*

The *numerus clausus* system was developed to ensure programme quality in the face of rapid expansion of higher education. The number of study places to be opened in each course at each public higher education institution is published annually to applicants by institutions via the Application Guide. In the allocation of places, institutions must follow a guidance order issued by the ministry responsible for higher education.

The ministry's guidance order is subject to the legal criteria for the operation of institutions and for the accreditation of courses (undertaken by Agency for Assessment and Accreditation of Higher Education, A3ES). It considers government objectives for the rationalisation of the national and local training offer, the resources available and allocated to the sector, and the national policy for training human resources. In some cases, it also includes special conditions for certain institutions, including certain study-place allocations for local students in the island regions.

The ministry's guidance order also considers current unemployment levels, which are provided by the Employment Centres of the Institute for Employment and Vocational Training (IEFP) and hearings with the representative bodies of the higher education institutions. Higher education institutions can influence the decision by appealing to constraints related to resources, including teaching staff, facilities, equipment and financial means.

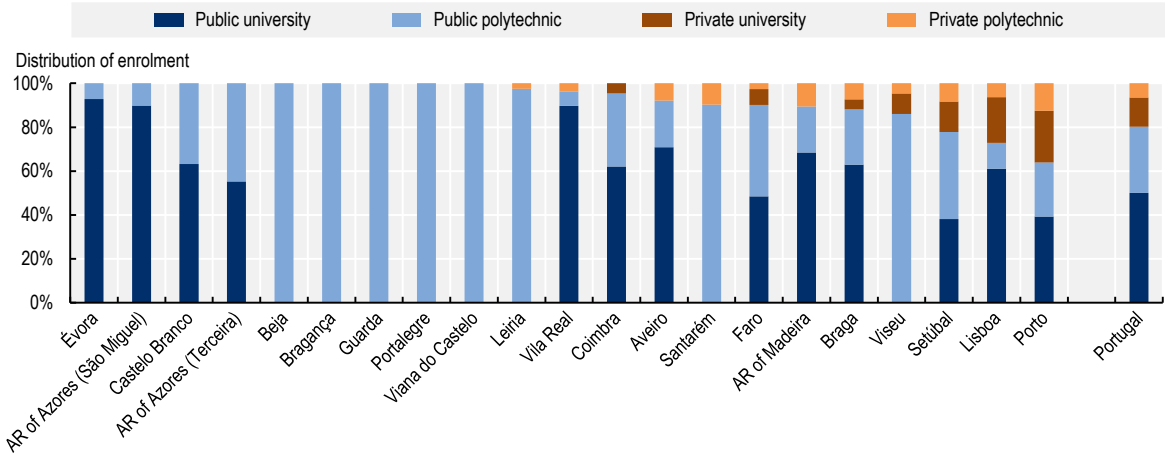
Source: DGES (2024[26]); MCTES (2024[1]); OECD (2022[27]).

The provision of higher education programmes in Portugal is split across universities and polytechnic institutes (DGES, 2024[28]) (see Box 2.3). Public provision is complemented by a private offer in areas where demand for study places is higher than the public supply. Public universities tend to be the most competitive and fill nearly all their allocated study places. In 2023/24, public universities filled 93% of their study places with students enrolling for the first time through the general access regime. Public polytechnic institutes had a slightly lower occupancy rate through the general access regime, at 80%. By contrast, private universities filled 77% of their study places while private polytechnic institutes filled just 56% with students enrolling for the first time through the general access regime (DGEEC, 2024[29]).

Private provision enrols a relatively large share of students in and around the metropolitan regions of Lisbon and Porto, as well as on the island of Madeira, which is indicative of excess student demand (Figure 2.6). In Porto, 36% of enrolled students attend private institutions, compared to 27% in Lisbon, followed by 22% in Setúbal, a municipality on the outskirts of the capital. This can be compared to 20% on average across Portugal. Madeira has a high share of students in private polytechnic institutes, suggesting that the public solutions at the university do not fully cater to student demand.

Figure 2.6. Public polytechnics are more dispersed across the country than universities

Distribution of higher education enrolment across different types of institutions, by district of enrolment, Portugal, 2023/24



Note: AR refers to Autonomous Region. Districts are ranked in descending order by the proportion of students enrolled in public institutions. Data includes students enrolled in all cycles of study.
Source: DGEEC (2023[30]), RAIDES.

Box 2.3. Portugal's binary higher education system comprises universities and polytechnic institutes

Higher education in Portugal is provided through a binary system comprising universities and polytechnic institutes. Universities focus on academic disciplines, promoting research and knowledge creation. They can confer bachelor's degrees (licenciaturas), second-cycle master's degrees (mestrados), as well as integrated master's degrees (mestrados integrados) and doctorate degrees (doutoramentos), following the Bologna cycles used in the European Higher Education Area.

The primary responsibility of polytechnic institutes is to provide applied programmes, which aim to train students to understand and solve concrete problems. Polytechnic institutes have traditionally provided bachelor's and second-cycle master's programmes but have in recent years expanded their scope. Most polytechnic institutes have now integrated short-cycle, ISCED level 5 Professional Higher Technical Course (CTeSPs) into their offer since 2014. Polytechnic institutes have been able to seek accreditation to offer doctoral programmes since 2023.

Large higher education institutions are made up of several faculties and schools that are administratively distinct from each other, with the legal status of "organic units" (unidade orgânica).

Seven public universities have one or more organic units within their overarching structure that offer polytechnic programmes. This has happened notably where there is no public polytechnic institute nearby, making the public university the main local provider of professional higher education courses. For instance, this is the case for the University of the Azores, the University of Madeira and the University of Algarve.

Source: OECD (2022[27]); Diário da República (2023[31])

2.3.2. The level of competition for places differs across geographies

While most higher education students in Portugal tend to live in their parental home while attending higher education, the proportion of mobile students has increased in recent years. District-level aggregate data indicate that students tend to apply to districts where the average minimum acceptance grades of programmes offered in the district are higher than in their parental region. It is good that students who have not found a suitable match in their local area are seeking a better match in a different region, but this trend might put additional pressure on higher education institutions in high-demand areas.

Increasing numbers of students choose to study away from the parental home

As noted, the majority of students in Portugal remain in their parental home while studying but increasing numbers of students who are enrolled in higher education institutions are registered as mobile (or "displaced" in the terms used in Portugal) students. In 2023, 33% of all students enrolled in all cycles of study (excluding only students enrolled in credit mobility programmes, e.g. exchange students) were considered mobile, up from 25% in 2014.

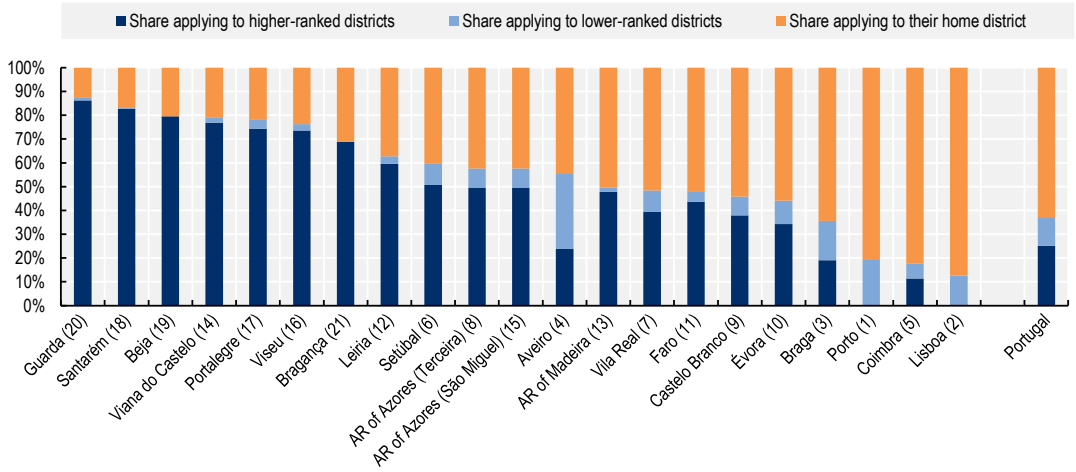
Data from applications in the first phase of the National Access Competition can provide an indication of the districts where students are willing to relocate to and from. As shown in Figure 2.7, the share of students in Portugal applying to a district outside their own was 37% in 2023, albeit with considerable regional variation. The district with the highest proportion of applicants seeking to be accepted in a district other than their own was Guarda, with 88% of students applying for programmes in other districts in the first preference. This can be compared with just 13% of students based in Lisbon applying elsewhere in their first preference.

The majority of students applying to programmes in a district outside their home district as a first preference in the National Access Competition apply to programmes in districts where the average minimum acceptance grade is higher than in their home district (Figure 2.7). This could suggest that students tend to be willing to move if they can attend more prestigious programmes than they could if they stayed in their home district. Aveiro stands out in this regard, with a large share of students applying outside of their home districts chose a programme in Coimbra, which has a lower overall ranking in terms of minimum grades, as a first preference.

A preference for students to move primarily if they are able to access a more selective programme than they could access in their local district could help explain the considerable geographical differences in the proportion of students who seek to move from their local area. For example, institutions in Guarda, Santarém and Beja offer programmes with relatively low average minimum grades. Figure 2.7 indicates that a majority of students whose parents live in these locations apply to programmes outside of the district. Conversely, applicants in districts with the programmes that have the highest average minimum grades – Porto and Lisbon – are among the least likely to select a programme outside of their own district as their first preference.

Figure 2.7. There is considerable variation in application patterns across Portugal

Proportion of students by the district they apply to in their first preference in the National Access Competition and the relative rank of minimum grades of programmes offered in the district they applied to, 2023



Note: AR refers to Autonomous Region. Mobility data do not distinguish between Terceira and São Miguel within AR Azores. The rank is showed in parentheses following the district name. The rank of average minimum grade in the district refers to the rank from highest to lowest of average grade of the last-placed students in the first phase of the National Access Competition in higher education programmes offered in the district. The average is weighted by the number of students in the programme and excludes programmes without any placement in the first phase.
Source: Distrito/GAES de candidatura e 1ª opção vs. distrito de colocação (2023), DGES (2023[32]); Vagas, colocados e classificação do último colocado: 1.ª Fase 2023, DGEEC (2023[33]).

Some districts in Portugal lack public options for students with lower grades

If more students are able to move out of the parental home to study, they are able to consider a greater number of higher education programmes, which in turn could help improve the match between student ability and motivations with the programme attended. From the point of view of institutions, it may create new recruitment bases and opportunities for institutions to provide a targeted offer or specialist programmes. At the same time, mobile students could create additional demand pressures in certain geographical areas.

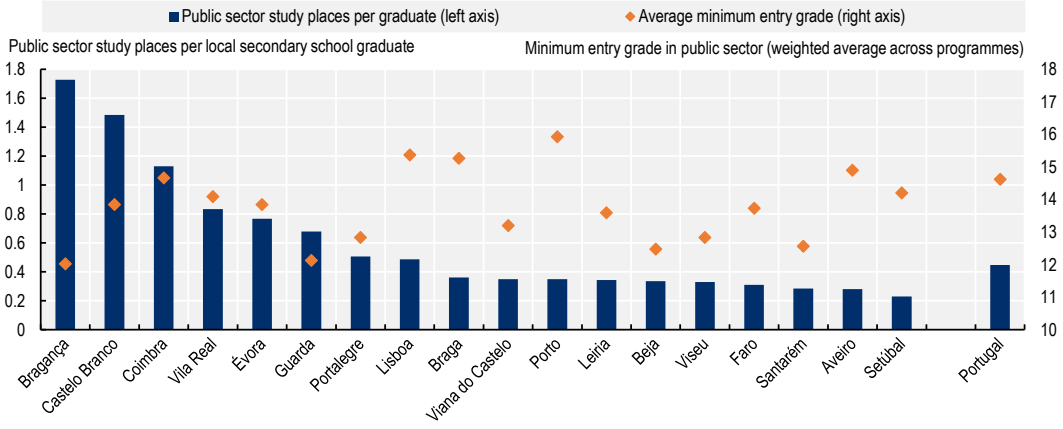
This could be a challenge in Portugal, where the number of local study places do not always correspond with the number of local secondary education graduates, even before mobile applicants are factored in

(Figure 2.8) (see also Fernandes et al. (2022[34]) and Lourenço and Sá (2019[35])). In most districts, there are more young people leaving secondary education than there are higher education study places. However, in Bragança, Castelo Branco and Coimbra, the number of study places is greater than the number of students leaving secondary education. By comparison, in districts like Setúbal and Santarém, the number of places available to local candidates is particularly small.

Demand for study places is particularly high in the north and in the Metropolitan Area of Lisbon. As Figure 2.8 shows, the average grades of the last-placed student in the first phase of the National Access Competition were highest in programmes in Porto, Lisbon and Braga. This indicates particularly high demand for study places in these locations. These are also the districts with the highest share of highly competitive programmes. In Porto, 19% of programmes required a grade of 17 points or more for access in the first phase of the National Access Competition in 2023. The shares of highly competitive programmes were also high in Braga (11%) and Lisbon (10%), compared with the share of highly competitive programmes across Portugal (6%) (DGEEC, 2023[33]).

Figure 2.8. Public higher education study places per local secondary education graduate vary across Portugal

Study places in public higher education institutions in 2023/24 per local secondary education graduate in 2022/23, by district, Portugal



Note: Study places refer places allocated to each programme in the first phase of admissions through the National Access Competition. Average minimum grade refers to the grade of the last-placed students in the first phase of the National Access Competition in higher education programmes offered in each district. The average is weighted by the number of students in each programme and excludes programmes without any placement in the first phase.
Source: DGEEC (2024[36]), Table 4, Vagas e inscritos pela 1.ª vez no Ensino Superior – 2023/2024: DGEEC, secondary education graduates, bespoke tables; DGEEC, RAIDES 2023/24; DGEEC (2023[33]), Vagas, colocados e classificação do último colocado: 1.ª Fase 2023.

2.4. Completion rates in Portugal are relatively strong across income groups

Widening participation rates mean that more diverse groups from historically under-represented populations increasingly attend higher education. This makes it even more pertinent to consider student completion rates, in order to assess whether the educational offering and related support services need to be adapted to cater to the more diverse student body.

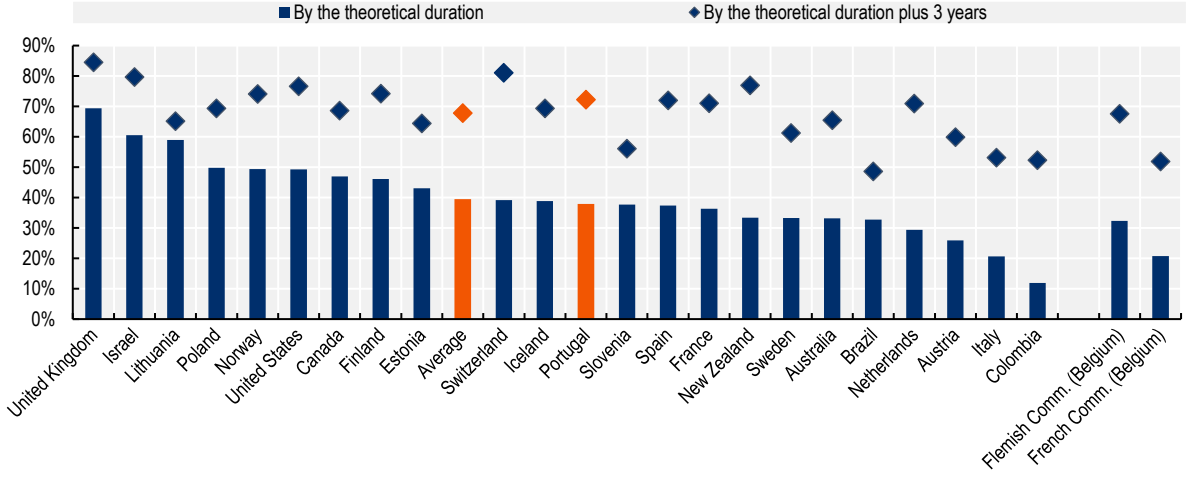
2.4.1. Completion rates in Portugal are broadly in line with the average across the OECD member countries

On average, completion rates in Portugal are similar to those across OECD member countries when it comes to completing higher education programmes within their theoretical duration. Figure 2.9 shows that 38% of full-time bachelor's students in Portugal graduate from a higher education programme of the same level and in the timeframe of the theoretical duration of the programme they had initially enrolled in. This is in line with the average completion rate seen across OECD member countries with equivalent data (38%).

However, when looking at completion rates beyond the theoretical duration of the programme (an additional three years), completion rates in Portugal tend to be higher than the average of OECD member countries. By the theoretical duration of the programme plus three years, 72% of students who initially enrolled had completed their programmes in Portugal, compared with 65% across the OECD member countries (Figure 2.9).

Figure 2.9. Completion rates by the end of the theoretical duration plus three years is higher in Portugal than the OECD member country average

Completion rates of full-time students who entered a bachelor's programme (or equivalent), by the end of the theoretical duration of the programme and by the end of the theoretical duration plus three years, true cohort data only (2020)



Note: The year of reference for the data (2020) corresponds to the graduation year three years after the theoretical end of the programme. The reference year for the entrance cohort changes depending on the duration of programmes. Data refer only to programmes with a theoretical duration of three, four or five years in Australia. Only programmes with a theoretical duration of three or four years are included for the United Kingdom. Data are provided for the theoretical duration plus one year in Canada and plus two years in the United States (not three years). Data are provided for the theoretical duration plus one semester (not the theoretical duration) in Sweden. Instead of 2020, data refers to 2019 in Canada and the Netherlands; and 2017 in the United States. Data on bachelor's level or equivalent programmes in Spain refer to higher education provided in universities only. For the French Community in Belgium, data refer only to the *hautes écoles* and the *écoles des arts*, representing about 60% of entrants to bachelor's or equivalent programmes. Countries and other participants are ranked in descending order of the share of students who graduated by the theoretical duration plus three years. See Annex 3, Education at a Glance 2022 for notes.
Source: OECD (2022[37]), Table B5.1, Education at a Glance.

International comparisons of completion rates can be difficult to interpret. Completion rates are affected by a range of factors that inherently depend on the system in place, such as the competitiveness of the access system, the flexibility within the system, and the incentives students face to finish a programme, for instance related to student finance constraints and labour market opportunities upon completion. For example, completion rates are relatively high in the United Kingdom, where higher education is highly selective, and

programmes are comparably rigid with limited opportunities for students to take up part-time studies or re-take exams several times. When programmes are more flexible, for example as is the case in the Netherlands and to some extent in Portugal, completion rate tend to be slightly lower, particularly when considering completion rates within the theoretical duration of a programme.

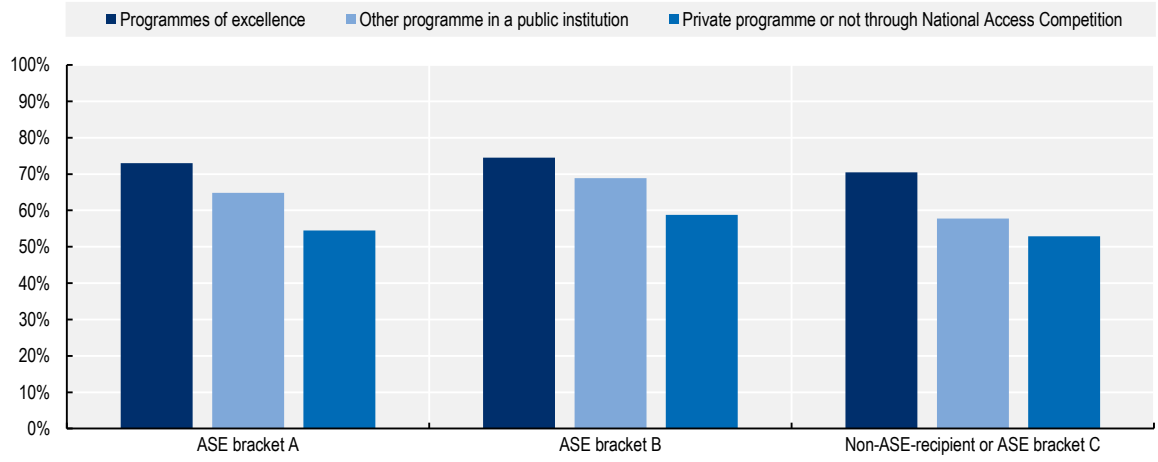
2.4.2. Completion rates tend to be higher in more selective programmes in Portugal

Progression and completion rates are influenced by the competitiveness of programmes, as selection processes aim to identify students who have the greatest chances to thrive in the programme. The influence of selection processes on the completion rates of higher education programmes in Portugal can be observed in the comparison between the most selective programmes, the so-called "programmes of excellence", and programmes in private institutions where the competition for study places tends to be lower (Figure 2.10).

Figure 2.10 illustrates that the completion rates are broadly similar for students across different income groups, within a given programme type. If anything, lower-income students are slightly more likely to complete their programmes than higher-income students. For example, for students in the selective programmes of excellence, 73% of students from ASE eligibility bracket A completed their programme, which is in line with the proportion of students from ASE eligibility bracket B (75%) and higher-income students (71%). Similarly, across other programmes accessed through the National Access Competition, the completion rate for students in ASE eligibility bracket was 65%, which is slightly lower than the completion rate for students from ASE eligibility bracket B (69%), and a little higher than the completion rate for other, higher-income students (58%).

Figure 2.10. Completion rates tend to be highest in the most selective programmes of excellence in Portugal

Proportion of students who graduate from their studies by 2021/22, by School Social Action eligibility bracket and higher education programme type (2018 cohort)



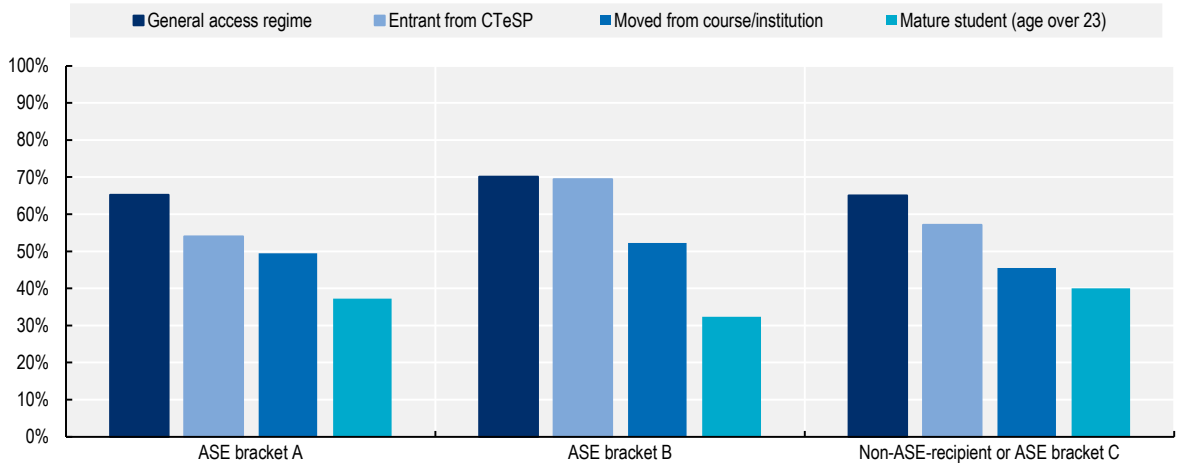
Note: Completion rates refer to the percentage of student entrants in 2018/19 who theoretically could have finished their programmes in 2021/22 (theoretical duration plus one year for a bachelor's degree).
Source: Bespoke tables from DGEEC, Prosseguimento de estudos no Ensino Superior 2015/16 a 2021/22.

Selectivity can also be seen to influence completion rates when considering different forms of entry to programmes. Figure 2.11 shows that completion rates tend to be higher for students who enter through the general access regime and lowest among mature students (see Chapter 3 for more on the admissions system). Considering students in the lowest-income group (ASE recipient in eligibility bracket A), 65% of

entrants via the general access regime had graduated by 2021/22, compared to 54% of entrants via CTeSPs, 49% of entrants from another course or institution, and 37% of entrants via the route for mature students (age over 23).

Figure 2.11. Completion rates tend to be higher for students entering via the general access regime in Portugal

Proportion of students who graduated from their studies by 2021/22, by School Social Action eligibility bracket and access regime (2018 cohort)



Note: Completion rates refer to the percentage of student entrants in 2018/19 who theoretically could have finished their programmes in 2021/22 (theoretical duration plus one year for a bachelor's degree).
Source: Bespoke tables from DGEEC, Prosseguimento de estudos no Ensino Superior 2015/16 a 2021/22.

References

Blanden, J., M. Doepke and J. Stuhler (2023), *Chapter 6 - Educational inequality*, Elsevier, https://doi.org/10.1016/bs.hesedu.2022.11.003. [2]

Bonneau, C. and S. Grobon (2022), *Unequal Access to Higher Education Based on Parental Income: Evidence From France*, World inequality Lab - workking paper No 2022/01, https://wid.world/document/unequal-access-to-higher-education-based-on-parental-income-evidence-from-france-world-inequality-lab-working-paper-2022-01/. [6]

Braun, S. and J. Stuhler (2018), "The Transmission of Inequality Across Multiple Generations: Testing Recent Theories with Evidence from Germany", *The Economic Journal*, Vol. 128/609, https://doi.org/10.1111/ecoj.12453. [7]

Caixa Geral de Depósitos (2023), *Ação social escolar: o que é e como solicitar?*, https://www.cgd.pt/Site/Saldo-Positivo/protecao/Pages/acao-social-escolar.aspx. [21]

Campbell, S. et al. (2022), "Matching in the Dark? Inequalities in Student to Degree Match", *Journal of Labor Economics*, Vol. 40/4, https://doi.org/10.1086/718433. [25]

Campbell, S. et al. (2019), "Inequalities in student to course match: evidence from linked administrative data", *CEP discussion paper CEPDP1647*, https://cep.lse.ac.uk/_NEW/PUBLICATIONS/abstract.asp?index=6373. [24]

Collado, M., I. Ortuño-Ortín and J. Stuhler (2023), "Estimating Intergenerational and Assortative Processes in Extended Family Data", *The Review of Economic Studies*, Vol. 90/3, https://doi.org/10.1093/restud/rdac060. [5]

Conselho Nacional de Educação (2024), *Recomendação: Exames e Acesso ao Ensino Superior: problemas e cenários*, Conselho Nacional de Educação, https://www.cnedu.pt/content/deliberacoes/recomendacoes/2024/Recomendacao_Exames_e_acesso_E.Superior.pdf. [10]

Conselho Nacional de Educação (2017), *Diário da República n.º 88/2017, Série II de 2017-05-08, páginas 8589 - 8595, Parte C - Governo e Administração direta e indireta do Estado*, Diário da República, https://diariodarepublica.pt/dr/detalhe/parecer/3-2017-106979153. [17]

Crawford, C., L. Macmillan and A. Vignoles (2017), "When and why do initially high-achieving poor children fall behind?", *Oxford Review of Education*, Vol. 43/1, https://doi.org/10.1080/03054985.2016.124067. [4]

DGEEC (2024), *Table 1, Vagas e inscritos pela 1.ª vez no Ensino Superior - 2023/2024*, Direção-Geral de Estatísticas da Educação e Ciência, https://www.dgeec.medu.pt/artpub/652fba2abd5c2b00958292c3. [29]

DGEEC (2024), *Vagas e inscritos pela 1.ª vez no Ensino Superior - 2023/2024*, DGEEC, https://www.dgeec.mec.pt/np4/EstatVagasInsc/. [36]

DGEEC (2023), *Estatísticas: 1.ª, 2.ª e 3.ª Fases*, https://www.dges.gov.pt/pt/pagina/regime-geral-ensino-superior-publico-concurso-nacional-de-acesso. [33]

DGEEC (2023), *Inscritos 2023-2024 Inquérito ao Registo de Alunos Inscritos e Diplomados do Ensino Superior*, Direção-Geral de Estatísticas da Educação e Ciência, https://www.dgeec.medu.pt/art/ensino-superior/bases-de-dados/todas/652ff89abd5c2b00958292d7#artigo-657182903c4f90613cb1b74d. [30]

DGES (2024), *Diagrama do Ensino Superior Português*, DGES, https://www.dges.gov.pt/pt/diagrama_ensino_superior_portugues?plid=371. [28]

DGES (2024), *Vagas*, DGES, https://www.dges.gov.pt/pt/pagina/vagas. [26]

DGES (2023), *Distrito/GAES de candidatura e 1ª opção vs. distrito de colocação, 1a phase, Estatísticas do Concurso Nacional de Acesso de 2023*, https://www.dges.gov.pt/guias/pdfs/statcol/2023/. [32]

DGES (2018), *Higher education, research and innovation in Porgual: Perspectives for 2030*, DGES, https://www.dges.gov.pt/sites/default/files/portugal_teri_system_rev_v14fev2018_v3_com_capa-compressed.pdf. [14]

DGES (2009), *"Education and Training 2020" Strategic Framework*, https://www.dges.gov.pt/en/pagina/education-and-training-2020-strategic-framework. [13]

Diário da República (2023), *Lei n.º 16/2023, de 10 de abril*, Diário da República, https://diariodarepublica.pt/dr/detalhe/lei/16-2023-211573083. [31]

European Commission (2023), *Education and Training Monitor 2023: Portugal*, European Commission, https://op.europa.eu/webpub/eac/education-and-training-monitor-2023/en/country-reports/portugal.html#5-higher-education. [12]

European Union (2021), *Council Resolution on a strategic framework for European cooperation in education and training towards the European Education Area and beyond (2021-2030) 2021/C 66/01*, EUR-Lex, European Union, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021G0226(01). [18]

Eurostat (2025), *Population by educational attainment level, sex and NUTS 2 regions (%)*, Eurostat, https://doi.org/10.2908/EDAT_LFSE_04. [19]

Eurostat (2025), *Population by educational attainment level, sex, age and degree of urbanisation (%), edat_lfs_9913*, Eurostat, https://doi.org/10.2908/EDAT_LFS_9913. [20]

Eurostat (n.d.), *Glossary: Degree of urbanisation*, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Degree_of_urbanisation. [38]

Fernandes, F. et al. (2022), *Relatório do Grupo de Trabalho sobre o Acesso ao Ensino Superior*, DGES, https://wwwcdn.dges.gov.pt/sites/default/files/relat_acesso_ensino_superior_28_jul_0.pdf. [34]

Hanushek, E. et al. (2022), "Long-run trends in the US SES—Achievement gap", *Education Finance and Policy*, Vol. 17/4, https://doi.org/10.1162/edfp_a_00383. [3]

Lourenço, D. and C. Sá (2019), "Spatial competition for students: What does (not) matter?", *The Annals of Regional Science*, Vol. 63, pp. 147-162, https://doi.org/10.1007/s00168-019-00930-1. [35]

MCTES (2024), *Revisão do Sistema de Acesso ao Ensino Superior - 2022/2023*, Ministério da Ciência, Tecnologia e Ensino Superior, https://www.dges.gov.pt/pt/noticia/revisao-do-sistema-de-acesso-ao-ensino-superior-2022-2023-marco-2024. [1]

Murphy, R. and P. Silva (2024), *Keeping It in the Family: Student to Degree Match*, IZA Discussion Paper No. 16931, https://www.iza.org/publications/dp/16931. [23]

Observatório das desigualdades (2025), *Beneficiários da Ação Social Escolar*, https://www.observatorio-das-desigualdades.com/2020/01/28/beneficiarios-da-acao-social-escolar/. [22]

OECD (2023), *PISA 2022 Results (Volume I) The State of Learning and Equity in Education*, OECD Publishing, Paris, https://doi.org/10.1787/53f23881-en. [9]

OECD (2022), *Education at a Glance 2022: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/3197152b-en. [37]

OECD (2022), *PISA 2022 Technical Report*, OECD Publishing, Paris, https://www.oecd.org/pisa/data/pisa2022technicalreport/. [8]

OECD (2022), *Resourcing Higher Education in Portugal*, OECD Publishing, Paris, https://doi.org/10.1787/a91a175e-en. [27]

Portugal2030 (n.d.), *O que é o Portugal 2030*, Portugal2030, https://portugal2030.pt/o-portugal-2030/o-que-e-o-portugal-2030/. [15]

RecuperarPortugal (2024), *RecuperarPortugal*, https://recuperarportugal.gov.pt/. [16]

Teixeira, P. et al. (2022), "Competition and diversification in higher education: Analysing impacts on access and equity in the case of Portugal", *European Journal of Education*, Vol. 57, pp. 235-254, https://doi.org/10.1111/ejed.12501. [11]

Notes

[1] This report investigates the conditions and opportunities of socio-economically disadvantaged students. In existing research, socio-economic disadvantage is typically considered by using proxy indicators such as data on family income and the level of educational achievement of parents. Income and level of education are highly correlated and are both appropriate proxies for indicating the socio-economic status of a family or an individual. This report uses both income and level of education as indicators of socio-economic status, depending on the data and research available.

[2] The terms "tertiary education" and "higher education" are used interchangeably throughout the report.

[3] The degree of urbanisation classifies local administrative units as cities, towns and suburbs or rural areas based on a combination of geographical contiguity and population density, measured by minimum population thresholds applied to 1 km² population grid cells. Each local administrative unit belongs exclusively to one of these three classes (Eurostat[38]).

[4] The bespoke tables from DGEEC are not directly comparable with the official data from DGEEC. The bespoke tables use the datasets Education Statistics (EE) from 2022/2023 and Survey on the Registration of Enrolled and Graduated Higher Education Students (RAIDES) from 2023/2024 (students enrolling in the first year for the first time). This is different from the official statistics from DGEEC. In the bespoke tables from DGEEC, students are considered to be in a) general study orientation if they take part in scientific-humanistic courses; b) vocational study orientation if they take part in courses of double certification (including technological courses, vocational courses (*cursos profissionais*), learning courses (*cursos de aprendizagem*), specialised artistic courses (*cursos artísticos especializados*); and c) in other study orientations if they take part in courses targeted to adults. Students in recurrent education (*ensino recorrente*) are excluded. This is different from the official statistics from DGEEC, where students are considered to be in a) vocational programmes only if they take part in vocational courses (*cursos profissionais*); and b) in other study orientations if they take part in courses with specific plans (*cursos com planos próprios*); and specialised artistic courses (*cursos artísticos especializados*).

[5] This report typically considers students to belong to lower-income families if they receive School Social Action (ASE) in secondary education. Correspondingly, the report will consider students to belong to higher-income families if they do not receive ASE. Using these proxies, it is possible to consider differences in enrolment by family income despite the lack of direct information about family income in educational statistics.

3 Prior achievement and admission systems

This chapter assesses the role of prior academic achievement and the admission system in influencing access to educational opportunities in higher education in Portugal. It considers the role of parental income and socio-economic status in influencing secondary education grades and study orientation. Special attention is given to general programme orientations and vocational programme orientations separately, given the considerable differences in the admissions routes open to these two groups. The chapter also provides suggestions for policy, drawing on international examples of good practice.

3.1. Introduction and key findings

Prior academic achievement in terms of both secondary education grades and study orientation – general or vocational – are key enabling factors for students who want to pursue higher education. However, prior academic achievement varies systemically by socio-economic background in Portugal, as in other OECD countries. Less socio-economically advantaged students face greater barriers on average compared to more socio-economically advantaged students in achieving the necessary course requirements and entry grades to be admitted to higher education.

Inequalities in educational outcomes by socio-economic background tend to increase over the course of individuals' lifetimes. Young people enter upper secondary education with different accumulated opportunities and levels of support that can be heavily influenced by their parents' income and level of education. These, in turn, intersect with other sources of social disadvantage. While inequities in educational outcomes build over the course of childhood, this chapter will primarily focus on the disadvantage that emerges or is reinforced at the end of secondary education and in the transition to higher education.

To address the challenges of equity in access to, and success in, higher education, policy interventions are likely required across the lives of children and young people to address sources of disadvantage both when they first appear and when they later manifest themselves. This chapter recognises that inequalities in educational outcomes during primary and lower secondary education are important but focuses on barriers that appear and can be addressed specifically during the transition to higher education.

Much of this chapter is structured around the specific issues students face in the two main types of secondary education orientation. As seen in Chapter 2, transition rates to higher education are considerably higher for students in general secondary education programmes than among students in vocational secondary education programmes, and the key barriers differ across the two groups. Historically, only students from general programmes were expected to enter higher education, while students in vocational programmes were oriented directly to the labour market. This means that general secondary education programmes are tailored to prepare students for higher education and higher education admission systems are designed to optimise the matching of general upper secondary students with higher education programmes. However, it is increasingly recognised that many vocational students can benefit from further specialisation through post-secondary learning in order to thrive in a rapidly changing labour market.

The chapter begins by considering barriers to progression to higher education related to secondary education, first focusing on opportunities for students in general education and, second, on pathways for students in vocational secondary education programmes.

Key findings and recommendations

Key findings

The orientation of secondary education programmes – general versus vocational – is crucial in determining the academic opportunities young people have when leaving secondary education in Portugal. The admissions process for higher education is designed to be fair in its objective treatment of students from general education, and this works well if it is assumed that grades given in prior education accurately reflect academic preparedness.

However, in general programmes, lower-income students tend to receive lower grades than higher-income students, a pattern that reflects a multitude of factors. Among these, one factor appears to be the more limited amounts of privately provided extracurricular tutoring that lower-income students can access

to prepare them for high-stakes exams, which disadvantages them in the assessments and exams. Another important factor that emerges is the divergence of internal grades awarded through assessment by subject teachers from grades awarded through externally marked national examinations. This divergence has been found to disproportionately benefit students from higher socio-economic backgrounds who thereby systemically receive higher entry grades for higher education than their less advantaged peers, given the same national exam grades.

Transition rates from secondary education to higher education are significantly lower for vocational students compared to general students in Portugal. This disproportionately affects lower-income students since they tend to be over-represented in vocational programmes.

The National Access Competition system is not well-designed for entrants from vocational study, and they have not been provided with straightforward alternative pathways into higher education. Compared to students in general secondary education orientations, vocational students in Portugal – like in many other countries – lack clear pathways, teaching support and instructions for course choice, requirements and application processes.

When vocational students do transition to higher education, they often enter via short-cycle programmes in polytechnic institutes. Many students from short-cycle programmes transition to a bachelor's programme upon completion; this indicates that short-cycle programmes open up opportunities for further education for vocational students.

However, this pathway is more time-consuming and resource-intensive relative to a three-year bachelor's degree. While institutions report that they allow students in some programmes to transfer credits from their short-cycle programme to a bachelor's degree, it does not appear that students can progress directly to Year 2 in a bachelor's degree yet.

Policy recommendations

1. Expand and formalise in-school exam-preparation study sessions for secondary education students in key subjects, for example, providing study space and peer mentors and/or teacher support.
2. Build on the existing preferential access schemes (priority quota) that acknowledge systemic differences in prior academic opportunities and achievement.
3. Strengthen alternative pathways to bachelor's degrees via special competitions for holders of dual certification (vocational students) and holders of short-cycle programmes (CTeSPs).

3.2. Disadvantage accumulates over students' life courses and results in systemic differences in secondary education grades

Focusing on students in general programmes that have been prepared for the possibility of entering higher education, transition rates are already high in Portugal, with 76% of secondary education graduates in 2022/23 moving on to a higher education programme in 2023/24. There is some regional variation across the country, with transition rates at just 67% in Setúbal compared with 87% in Bragança, according to official figures (DGEEC, 2024[1]). According to bespoke data produced by the Portuguese Directorate-General for Statistics of Education and Science (*Direção-Geral de Estatísticas da Educação e Ciência*, DGEEC),[1] transition rates for general secondary education graduates in 2022/23 are also 8 percentage points higher among students from higher-income backgrounds compared to those from lower-income backgrounds across Portugal (Chapter 2).

To understand the barriers to further widened participation, it is important to consider the role of prior achievement among secondary education students. A necessary condition for participating in higher education is attaining sufficiently high grades to enter a programme that students can practically attend. From an equity perspective, two issues emerge as particularly important in this respect in Portugal: an inflationary pressure on internal school grades and access to private tutoring classes to prepare for national exams, both of which are likely to contribute to widening the achievement gap between students from higher- and lower-income backgrounds.

3.2.1. Students whose parents have attained higher education are more likely to receive top grades than students whose parents have not

The general access route is the main higher education admission system for students in Portugal, and it is designed to optimise the match between demonstrated student ability, student preferences, and programme requirements. The general secondary education programmes are tailored to optimise students' demonstrated ability by preparing students for the internal school assessments and external national exams required for access to the admission system. For the public higher education sector, the general access route occurs via the National Access Competition, whereas institutional competitions are held for candidates to private institutions. Institutional competitions are also held for short-cycle Professional Higher Technical Course (CTeSPs).

For the general access route, students' entry grade points play a key role, so it is important that they accurately reflect performance. Allocation of students to available study places is automatic in the general access route and solely based on the student preference selection and their overall entry grade points. The entry grade points are determined by the secondary education leaving grade and specific external examination grades (Box 3.1).

Box 3.1. Setting secondary education grades for students in general study orientations in Portugal

Secondary education students in general study orientations in Portugal receive internal grades in each of their subjects based on the assessment of their subject teachers. Students also have to take (at least) three national exams. The national exam in Portuguese is mandatory. The others are elective and can be either the two-year subject that students in the general orientation have already elected within their curricula, or in other subjects eligible for national exams. The final school-leaving grades are determined as a weighted average of the grades from the internal assessments and the grades in the national exams.

The external national exams also function as entry exams to higher education for entry through the general access route (see Box 3.2). For entry to higher education via the general access route, the entry grade points are calculated using results from the national exams in specific subjects listed by institutions for each higher education programme. The higher education entry grade points used for ranking applicants and matching them to programmes in the general access route are determined by a weighted average of the final school-leaving grade, the grades in the specific external national exams needed for the programme, and the grade in any pre-requisites (see Box 3.2).

Source: DGES (2023[2]).

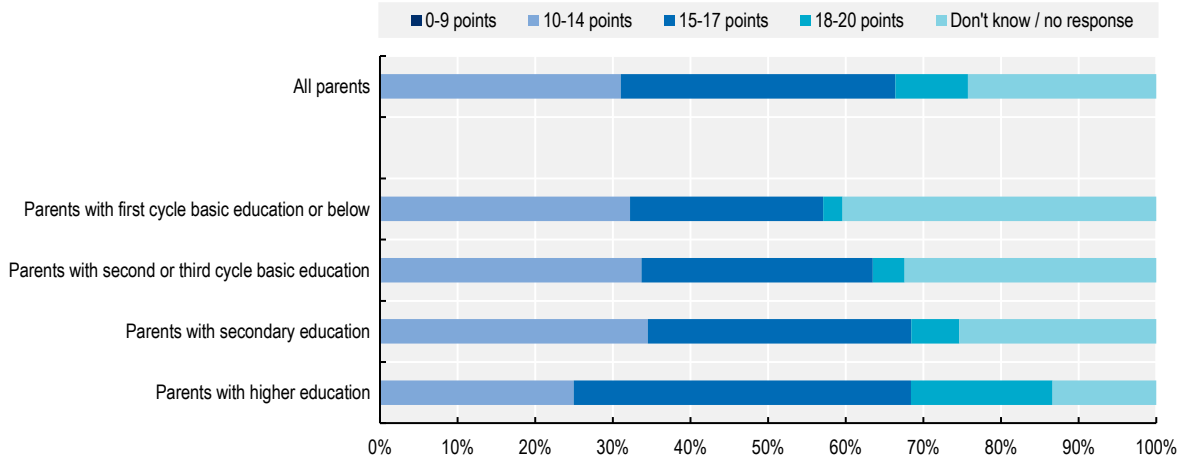
However, the school-leaving grades received in upper secondary education on average vary by socio-economic background in Portugal. Out of students with highly educated parents, 18% reported receiving top

internal grades in the range 18-20 in 2020/21, compared to just 6% of students whose parents attained secondary education (Figure 3.1). Similarly, students in private secondary educations in Portugal tend to receive higher grades than those in the public system. Among students in private schools, 13% received a grade in the range 18-20 in 2020/21, whereas just 8% in public schools overall received top grades in this range (DGEEC, 2021[3]).

From an equity perspective, it is positive that the National Access Competition relies on an algorithm that automatically ranks and places students in programmes (see Box 3.2). Indeed, research shows that the degree of mismatch between student quality and programme 'quality', measured by the median entry grades of students who applied and among students enrolled, tends to be higher in countries where admissions are processed in universities and elements are evaluated by individuals and therefore based on subjective ratings (Murphy and Silva, 2024[4]). While students from lower socio-economic backgrounds still tend to undermatch in terms of programme quality across the entire achievement distribution (by attending less competitive programmes than their school grades would in theory allow) compared to students from higher socio-economic backgrounds in Portugal, this mismatch is mainly due to students' own ranking of programmes (Murphy and Silva, 2024[4]).

Figure 3.1. Almost 1-in-5 students whose parents attained higher education receive top grades

Final secondary education grades from the internal assessments, by level of parental education, Portugal 2020/2021



Note: Grades are given on a scale from 0-20 and the minimum passing mark is 10.
Source: Estudantes à saída do Ensino Secundário em 2020/21, DGEEC.

Student grades depend on several interlinked factors, including – but not limited to – individual talent and commitment to studies, preparedness from previous studies, school and teacher quality, available materials, role models, ambition and parental support. While several factors – including preparedness, quality of school and parental support are influenced by students' socio-economic backgrounds, this chapter will focus on two factors: access to private tutoring and the Portuguese grading system in secondary education. These factors have been chosen since they appear relatively late in secondary education but can still greatly influence overall student grades, they vary systemically by student socio-economic status, and they are particularly relevant in the Portuguese secondary education system.

Box 3.2. The National Access Competition is the main entry point to higher education

The National Access Competition is good for allocating students in the general access route

The National Access Competition is the main route for accessing undergraduate programmes in public universities and polytechnics in Portugal and is organised by the Directorate-General for Higher Education (DGES) at the end of each school year. It is open for secondary education graduates who apply to public institutions through the general access route, that is, students applying with secondary education grades and national exam grades in the subjects required by bachelor's programmes.

Candidates can choose up to six programmes, in order of preference. The candidates are subsequently ranked based on their higher education entry score – their secondary education national exams and overall secondary education leaving grades. Students with the best overall score have the greatest chance of accessing their first choice of programme. Most of the study places are filled in the first admissions phase, but if students do not accept the option that they are offered, they can apply to the subsequent rounds of placement, although fewer study places are available at that time.

The national exams receive greater weight when calculating the higher education entry grade points from 2025/26

In July 2023, the Ministry announced that the weight of the national exams in specific subject in calculating the higher education entry score should be greater than previously. From the academic year 2025/26, national exams will be given a weight of 45%, or greater, and the weight of each of the two to three exams can range from 15% to 30%. This is a change from the previous rule where weight of national exams could vary between 35% and 50%. By comparison, the final school-leaving grade, will count for 40% to 55%, changing from the previous range of 50% to 65%.

The number of national exams requested for entry via the National Access Competition increases from 2025/26

In February 2023, the Ministry announced changes in the requirements for the number of national exams needed to enter the National Access Competition. Starting with the 2025/26 cohort, candidates need to submit two to three external national exam results in the application process, which is an increase from the previous requirement of one to three exam results. The institutions are responsible for deciding the number of exam results needed.

Sources: DGES (2023[2]); Diário da República (2023[5]).

Part of grade differences likely stem from variations in access to private tutoring

Extracurricular tutoring can have an impact on student preparedness for assessments and exams, both through targeted revision in subject-specific topics and preparation for the format of exams. Portugal has a relatively low minimum number of hours of instruction time in the secondary education curriculum, which opens up the possibility of spending time in complementary private tutoring. Compared to other countries for which comparative data exist, Portugal is among the countries with the lowest average hours of intended instruction time per year in general secondary education. Portuguese students have on average 764 hours of intended instruction time per year, compared to 852 in the Netherlands and 1 656 in France (OECD, 2023[6]).

This relatively low average number of hours is due in part to a lower number of instructional hours in the final year of secondary education (year 12) in the general orientations, compared to the two years prior (years 10 and 11). During the two first years of general upper secondary education, students study two-year subjects examined through high-stakes national examinations (see Box 3.4). Fewer hours are allocated to the final year of secondary education (year 12), where the emphasis is instead placed on Portuguese and the three-year subjects that also involves high-stakes national examinations (Figure 3.2). While the curriculum includes one-year courses in the final year, the curricular time dedicated to these subjects tends to be lower, particularly since these courses are not examined in national exams.

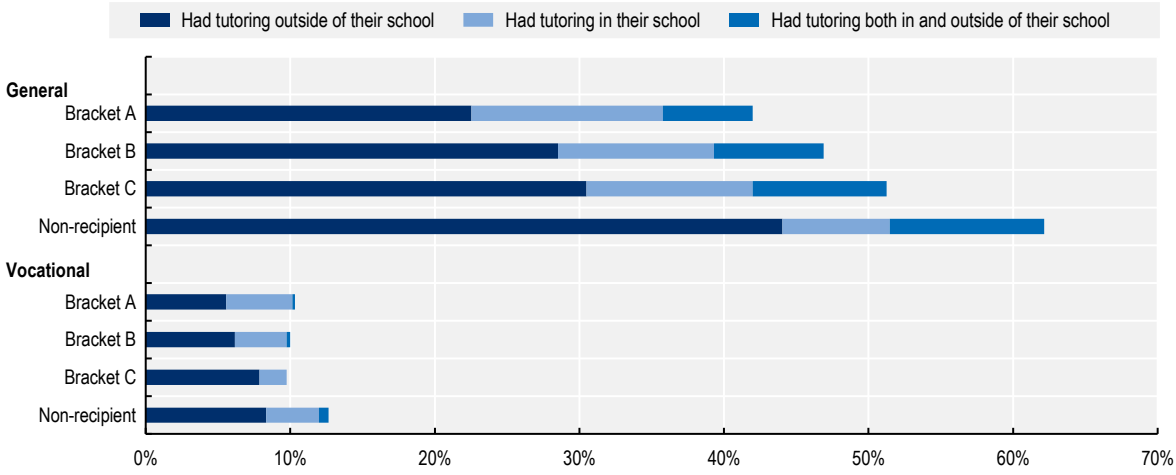
Instead, the final year is seen as a way to broaden students' perspectives via the low-stakes one-year courses. Alternatively, the final year can be seen as a second chance for students in general programmes to re-take the national exams in subjects that were not on the curriculum, or for which they would like a higher grade, as reported in stakeholder interviews held for the purpose of this project. The low instruction time, in combination with the possibility to re-take high-stakes exams in the final year of secondary education, provides opportunities for the investment in extracurricular tutoring.

'Explanation' (*explicação*) is a tutoring activity that is reportedly well known in Portuguese society and has existed for generations (CNE, 2024[7]). Tutoring can be sought by, and offered to, students who are struggling with their academic performance or who are at risk of dropping out of secondary education. As such, it can play a key role in a framework for inclusive education, which includes targeted support for students who need it. For instance, in-school tutorial support for students struggling with poor achievement (*Apoio Tutorial Especifico and Apoio Educativo Tutorial*) has been a key strategy to reduce drop-out rates in schools in Portugal since 2016/17, involving additional Portuguese and mathematics classes, training teachers and school leaders, and hiring extra teaching and student support staff (OECD, 2018[8]).

At the same time, private tutoring outside of school is offered to, and taken up by, students who aim to improve already high grades. Using data from 2018/19, DGEEC shows that 23% of students receiving tutoring were primarily motivated by wanting to improve on good grades, and 27% were primarily motivated by wanting to prepare for exams (DGEEC, 2021[9]). From an equity perspective, it is concerning if the education system incentivises students to invest in private tutoring outside schools, since this provides an advantage to students whose parents are able and willing to pay for extra classes. Data from Portugal illustrate that higher-income students are the most likely to receive tutoring support outside of their school (Figure 3.2). Figure 3.2 also shows that tutoring is primarily taken up by students in general secondary orientations.

Figure 3.2. Lower-income students are less likely to receive extracurricular tutoring

Proportion of students receiving tutoring in and out of school, by School Social Action eligibility bracket, Portugal 2022/2023



Note: Results shown are unweighted. The survey data refers to 2023/24 and the student School Social Action bracket refers to student status in 2022/23.
Source: Estudantes à saída do Ensino Secundário em 2022/23, DGEEC.

There are international examples of free mentoring and tutoring initiatives that aim to reduce barriers caused by accumulated educational disadvantage among lower-income students from general secondary education programmes. Large-scale programmes include the Seren Academy in Wales and *SaberES* in Colombia that both aim to prepare high-achieving secondary education students for the national higher education entry exams (Box 3.3). Some schools in Portugal have also started initiatives to support their students with extra support classes, although the focus so far has tended to be on supporting students at the risk of low achievement. For example, one representative from a secondary school participating in the project focus groups reports that their school provides study sessions and teacher tutoring using timetable credits and priority intervention educational territory (*Territórios Educativos de Intervenção Prioritária*, TEIP)[2] credits.

There is an opportunity to build on these existing activities in schools by expanding and formalising in-school exam-preparation study sessions for secondary education students in key subjects, for example, providing study space and peer mentors and/or teacher support. It would be important to find ways to formalise activities and take into account teacher shortages to allow students across all schools to access these initiatives. To this end, options could be considered in consultation with schools through feasibility assessments. Teacher-led study help could also be complemented with student-led peer-tutoring initiatives either within secondary schools or with the support of higher education students acting as tutors, for example drawing on the peer-tutoring element in the Talens programme in France (Ly, Maurin and Riegert, 2020[10]) (Box 3.3). This offer could be delivered either in person or remotely online in order to manage logistical challenges and costs. Such initiatives could be delivered while monitoring quantity and quality indicators across schools to make sure that any gaps in provision are closed.

Such actions would support and build on the recommendation from the National Council for Education from 2024, which recommends that programmes, mechanisms and strategies to support learning in schools be created or strengthened, noting that these programmes can be flexible, and can consider integrating higher education students through partnerships with higher education institutions (CNE, 2024[7]).

Box 3.3. Extracurricular mentoring for secondary education students in France, Wales and Colombia

The **Tutoring and Career Counselling for High School Students (Talens) in France** was a two-year tutoring programme implemented through a randomised controlled trial where volunteers from higher education institutions provided 14 tutoring sessions on Saturdays to year 11 students who had volunteered for tutoring after having been identified by high-school principals as having academic potential. The evaluation found that the intervention helped stronger students improve their results but was shown to be detrimental for students who had a weaker academic record prior to the programme, highlighting the need to pay careful attention to the design of peer counselling programmes (Ly, Maurin and Riegert, 2020[10]).

The Seren Academy in Wales is a government-funded programme to support secondary education students' aspirations and ambitions by helping to widen their horizons, develop a passion for their chosen field of study and reach their academic potential. The Seren Academy is available to the most academically talented students from state schools and further education colleges who have been identified by their institution as meeting the eligibility criteria (Welsh Government[11]).

The **"*SaberEs* Strategy" in the city of Medellín, Colombia,** is a city-wide exam-preparation programme designed by the Medellín Education Department. It was first implemented between 2016-2019. In 2024, the Mayor's Office of Medellín relaunched the SaberEs strategy in the city's 219 official educational institutions, as part of the 2024-2027 Development Plan. SaberEs seeks to improve the quality of education by providing comprehensive extracurricular exam-preparation training to economically disadvantaged students ahead of the standardised test Saber 11, a mandatory secondary education leaving exam that is required for access to higher education and scholarships. An evaluation by Posso, Saravia and Uribe (2023[12]) finds that the intervention raises test score achievement and thereby reduces the gap in results between low and high-income students.

Part of grade differences likely arise from divergent internal grades for certain groups of students

Since the student-to-programme match in the general access route depends on students' school-leaving grades, it is of key importance that these accurately reflect student preparedness. The final school-leaving grade that students receive in general orientations of secondary education is jointly determined by the scores in the national exams and the internal subject grades provided in schools. While national exams are externally marked, the grades provided by schools are given based on the assessment of subject teachers (see Box 3.4). The aim is that school grades complement national exam grades by accounting for academic and behavioural performance in school throughout the year.

However, research in Portugal has increasingly suggested that some schools systematically award higher grades in their internal assessments compared to the results achieved through the national exams (Nata, Pereira and Neves, 2014[13]; Baptista, Sin and Tavares, 2022[14]; Silva et al., 2025[15]). Baptista, Sin, and Tavares (2022[14]) find a systemic disparity between internal grades and national exam scores in a range between 0.5 and 0.8 points on the grade scale from 0 to 20. Typically, the highest internal grades occur in subjects not assessed through national exams. The systemic amplification of internal grades was made especially clear during the COVID-19 pandemic which provided a unique field experiment. The social distancing measures in place meant that students were exceptionally not required to take national exams, and these did not count towards the final school-leaving grades (MCTES, 2024[16]).

Divergent internal teacher assessment-based grades relative to external national exam grades are concerning from an equity perspective since these tend to negatively affect lower-income students disproportionately, because students from advantaged backgrounds tend to be given higher internal grades by teachers, relative to their demonstrated abilities in the national exams. Baptista, Sin and Tavares (2022[14]) find that when national exam scores are held constant, students receiving School Social Action support tend to be given lower internal grades than their non-recipient, higher-income peers (Baptista, Sin and Tavares, 2022[14]). Moreover, the practice of inflating internal grades relative to national exams tends to be more pronounced in private schools than in public schools (MCTES, 2024[16]). Research shows that teachers in private schools more rarely award lower internal grades than the national exams scores, as compared to teachers in public schools and Priority Intervention Educational Territories (TEIP) schools[3] (Silva et al., 2025[15]).

If students from higher-income backgrounds are more likely than students from lower-income backgrounds to receive a higher internal grade than their academic skills would imply, lower-income students enter the National Access Competition with a lower chance of entering competitive programmes. The disadvantage is likely to be exacerbated in geographical places where there is fierce competition for study places. Indeed, Silva et al. (2025[15]) find a higher probability of grade inflation in northern districts where there is greater competition for study places (Silva et al., 2025[15]). Similarly, previous research has shown that private schools in Porto and Braga tend to attribute higher internal grades than most other schools to students with similar performance in the national exams (Baptista, Sin and Tavares, 2022[14]; Neves, Ferraz and Nata, 2017[17]; Nata, Pereira and Neves, 2014[13]).

To ease the pressures on study places in Porto and Lisbon, it was likely a well-intended idea to reverse the reweighting of *numerus clausus* in the 2018/19 academic year which reduced number of public study places allocated to Lisbon and Porto by 5%. Since students tend to opt to remain in their parental home, even if that involves forgoing higher education, the effect of the policy was mainly to increase the selectivity in institutions with high student demand, rather than to shift demand away from metropolitan regions as initially intended (Teixeira et al., 2022[18]).

It remains to be seen whether the reweighting of the value of national exams and school assessments will result in in reducing the impact of grade inflation in general education. The decision to increase the weight of the national exams relative to the internal grade should contribute to limiting the effect of inflated internal grades (Box 3.4). Simultaneously, the Ministry has moved to a three-test model for national exams (from exceptionally having no national exams during COVID-19, and from four national exams before COVID-19), which means that internal subject grades are again guided by results in the national exams (Box 3.4). This can help to better anchor the internal assessments to externally marked national exams, which contributes to limiting the mismatch between the two. If divergent internal grades continue to be a problem after the introduction of the three-test model, further policy action should be considered to better align internal assessments with demonstrated academic ability.

Box 3.4. The Ministry has attempted to reduce grade inflation by strengthening the role of the national exams in determining the final upper secondary education leaving grades in Portugal

The national upper secondary exams in Portugal are externally graded in a double-blind manner, where students and teachers are unable to identify each other, and is therefore a more objective method of assessment than the internal grades provided directly by teachers who know the students. Imposing national exams can therefore help schools align the internal assessment to a directly comparable assessment in one more subject.

In 2023, the Ministry introduced a three-test model which increases the number of national exams that students in general study orientations must take to complete secondary education. This is a change from the exceptional arrangement implemented during the COVID-19 pandemic where national exam grades did not count towards the secondary education leaving grade.

This means that subject grades are now jointly determined by the external national exam grade and the internal teacher assessment-based grade or solely by the internal teacher assessment-based grade in cases where there is no external national exam grade. In 2023, the weight of national examinations in the final secondary education leaving grade were reduced to 25% from 30%. Correspondingly, the weight of internal assessments was set to 75%, up from 70%. These measures apply to students who started Year 10 in 2022/23.

Finally, the Ministry confirmed in 2023 that there would be a reweighting of each subject grade in determining the final secondary education leaving grade by introducing a "proportionality". Each subject receives a weight corresponding to the number of years of the course, instead of giving each subject the same weight. This means that one-year courses – which are not subject to national examinations and therefore have tended to be exposed to inflated grades– will make up a smaller share of the final leaving grade. These changes apply to students who started Year 10 in 2023/24

Source: DGES (2023[2]); ePortugal (2023[19]); and AACRAO (2023[20]).

3.2.2. Preferential access policies in higher education institutions can help mitigate the effects of inequities in prior achievement on educational opportunities

While much of the disadvantage faced by lower-income students in achieving sufficiently high results in prior achievements needs to be addressed where it occurs, as discussed in the previous section, the higher education sector can help mitigate the effect of this disadvantage on educational outcomes at the point of admission processes. As the higher education sector is responsible for setting the detailed criteria for entry to higher education programmes, it can play a valuable role in ensuring students' academic preparedness while also promoting widened access through preferential access policies targeting historically under-represented groups.

Preferential access policies in higher education acknowledge that part of the gap in prior achievement between disadvantaged and advantaged groups stem from inequalities in the opportunity to develop academic skills rather than from underlying differences in academic ability. As such, they aim to narrow the gap in the opportunity to access higher education programmes between disadvantaged and advantaged groups. Through stakeholder interviews conducted for this project in Portugal, it is understood that the main objective among institutions with highly competitive programmes is to attract and select the most promising students into their programmes. Where preferential access policies are designed to even the playing field between applicants by considering academic potential rather than simply academic preparedness, they can

help selective institutions improve the effectiveness of the selection process in identifying the applicants with the best chances of success.

In 2022/23, the Ministry made a conscious attempt to promote widened access to the most selective programmes in Portugal by implementing a 2% priority quota targeting lower-income students. The priority quota reserves 2% of study places (or two places, whichever is higher) in higher education programmes for candidates receiving School Social Action eligibility bracket A. Candidates who apply via the priority quota are ranked within the quota in descending order of their application grades, until it is filled. If the proportion of candidates in eligibility bracket A is greater than 2%, the remaining candidates are transferred to the general quota and ranked with the remaining candidates. A recent evaluation of the policy indicates that while take-up was lower than expected (only 43% of eligible students used the quota), 41% of students who were admitted via the priority quota benefited from a reduced grade offer (Silva, Morin and Cardoso, 2024[21]).

However, if take-up increases as planned, it is conceivable that the small size of the quota will mean that the effect will be limited in future. Only 86 out of the 1 119 programmes that opened study places in the first phase of admissions through the National Access Competition in 2023 had fewer than 2% of places or less than two places allocated to students from ASE eligibility bracket A on average between 2017/18 and 2022/23. In most cases where the quota would be active, it would be because the programmes are small, making the limit of 2 places allocated more relevant than 2% of places, according to bespoke tables produced by DGEEC.[4]

Considering the most selective “programmes of excellence”, defined as those where students need entry grades of 17 or higher to be accepted in the first phase of admissions, only 8 programmes allocated on average either under 2% of places or under two places to candidates in eligibility bracket A between 2017/18 to 2022/23. Out of all the programmes with less than 2% or two places allocated to candidates in eligibility bracket A, the majority (72%) were in programmes where the grade of the last-placed student in the first phase of the National Access Competition was below 15, indicating that the programme is less competitive, according to bespoke tables and data on the admissions grades produced by DGEEC (2023[22]). As such, these programmes would not be the primary target for a quota aiming to widen access to the most competitive programmes in the country.

To build on the existing preferential access scheme (priority quotas) that acknowledges systematic differences in prior academic opportunities and achievement, the Ministry could commission an evaluation of student success among groups benefiting from the priority quota and other access schemes, such as special regimes, including for national scholarship holders from Portuguese-speaking African countries, and special contingencies, including candidates from the Autonomous Regions of the Azores and Madeira. In addition, an evaluation could consider the adequacy of the size of the priority quota and other access schemes relative to their respective target populations in secondary education. The findings from such reviews can subsequently be used to inform decisions about targeted student support and whether it is desirable to expand the size of the priority quota.

As an alternative, Portugal could consider offering admission at a given grade discount relative to the grade of the last-placed student not using the quota. For such a model, inspiration could be drawn from Ireland. The preferential access scheme “HEAR” defines a reduced number of grade points that students from target groups require in order to receive an offer of admission (Box 3.5).

Box 3.5. A preferential access scheme in Ireland

A long track-record of institutional practice has evolved into the national, **"Higher Education Access Scheme" (HEAR) in Ireland,** where institutions reserve a number of study places for socio-economically disadvantaged entrants. Applicants who apply via HEAR can receive a "reduced-points offer", where their final entry grades are lower than what would be strictly necessary if competing with other applicants in the standard access route. On arrival at the institution, HEAR entrants are then provided with wrap-around academic, personal, and social supports once they start their studies. An evaluation from 2013 using administrative data found that HEAR-eligible applicants are more likely than their peers to make the transition to higher education and found no evidence that HEAR-eligible entrants were any more likely than their peers to drop out between the first and the second year of their higher education programme (Byrne et al., 2013[23]).

Policy recommendations

Key finding:

Accumulated educational disadvantage among lower-income students from general secondary education programme orientations relative to those from higher-income backgrounds, raise barriers to widening access higher education and achieving a good student-to-programme match.

Recommendations:

1. Expand and formalise in-school exam-preparation study sessions for secondary education students in key subjects, for example, providing study space and peer mentors and/or teacher support.
2. Build on the existing preferential access schemes (priority quota) that acknowledge systemic differences in prior academic opportunities and achievement.

3.3. Students from vocational secondary education programmes who want to transition to higher education face considerable barriers

In Portugal, as in other OECD member countries, transition rates from secondary education to higher education are considerably lower for students in vocational orientations than for students in general orientations. To some extent, this is because the objectives for vocational and general programmes differ: general programmes are designed to prepare students for higher education, whereas vocational programmes aim to prepare students for direct entry into the labour market. While it is beyond the scope of this project to thoroughly review the process of selection into secondary education study orientations, it is reasonable to assume that not all students are ideally placed in vocational tracks and previous research finds that it is essential to ensure that there are no "dead ends" in an education system (Stronati, 2023[24]).

There should be a keen national interest to ensure that there are possibilities for students to change their educational pathway towards the end of secondary education. From an equity perspective, it is concerning that lower-income students are over-represented in vocational programmes, particularly if some young people from lower-income backgrounds enter vocational programmes because they perceive this to be the

best way to start contributing quickly to family incomes, as highlighted by project stakeholder interviews and focus groups. From an economic productivity perspective, it is recognised that some vocational students – like other learners – could benefit from some form of higher education to thrive in a rapidly changing labour market (Jobs and Skills Australia, 2025[25]), including mature students engaging in upskilling and reskilling. It is therefore essential that students from vocational programmes are offered viable opportunities to continue their studies to specialise or broaden their skills.

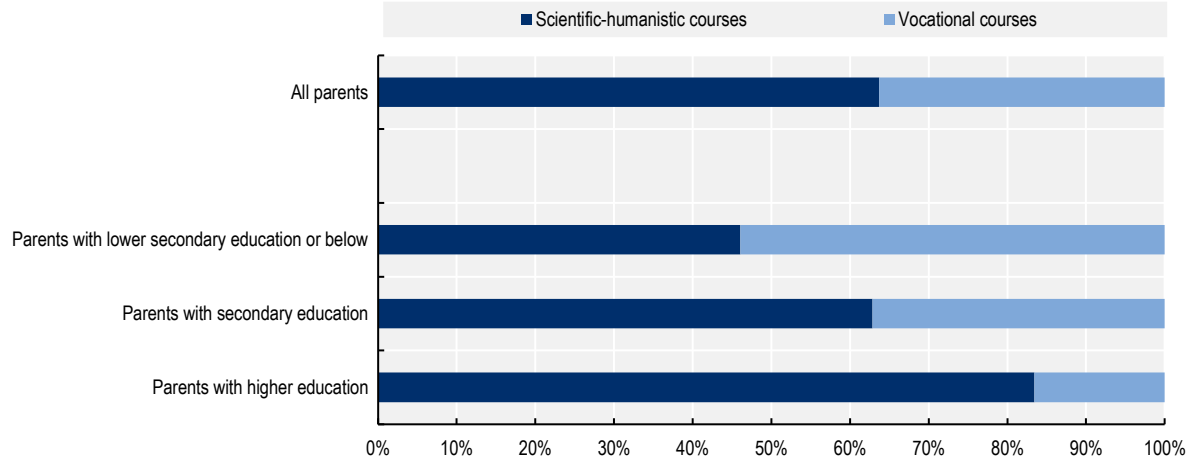
3.3.1. Students from lower socio-economic backgrounds are over-represented in vocational secondary education programmes

Transition rates of students from vocational secondary education orientations lag far behind those of students from general orientations, and lower-income students in vocational programmes experience greater barriers. While 76% of those graduating from a general programme in 2022/23 across Portugal transitioned into degree-conferring higher education or short-cycle programmes in the year immediately following their graduation, this figure was just 22% for students in vocational programmes (DGEEC, 2024[1]). Among students from vocational orientations graduating in 2022/23, lower-income students are also 3 percentage points less likely than higher-income students to move on to higher education across Portugal, according to bespoke data from DGEEC (Chapter 2).[5]

Students from families with lower economic status are disproportionately affected by the barriers to accessing higher education experienced by vocational students since they are more likely to attend vocational secondary education programmes compared with students from higher socio-economic backgrounds. A majority (54%) of students whose parents have completed lower secondary education or below (corresponding to ISCED level 1 or 2) attend vocational courses, compared to 37% of students whose parents have an upper secondary qualification (ISCED level 3). Only a minority (17%) of students whose parents attained higher education attend vocational secondary education programmes (Figure 3.3).

Figure 3.3. A majority of students with lower-educated parents take vocational secondary education programmes

Proportion of students in the two main secondary education study orientations, by level of parental education, Portugal 2020/2021



Source: DGEEC, Estudantes à saída do Ensino Secundário em 2020/21.

Although vocational tracks were historically designed to permit direct labour market entry, findings from focus groups undertaken within the scope of the project highlight that not all students in vocational orientations are

interested in pursuing a career in their field of study. Focus group participants report that there are at least two types of student profiles within the vocational student population. First, those who wish to enter the professional areas directly related to their chosen courses. Second, students whose primary objective is to quickly earn an income. Upon leaving secondary education, this second group tends to seek jobs that do not necessarily correspond with their vocational course. Instead, they may seek general, often low-skilled routine jobs or work in a family business.

It is potentially problematic for young people, the education system and the economy at large if some young people from lower-income backgrounds participate in vocational secondary education programmes, not because they are interested in pursuing the vocational path in question, but simply because they perceive this to be the best way to quickly start contributing to family income. This suggests that some young people from low-income backgrounds may forgo the opportunity to use and build on skills gained from their secondary education programmes to leverage higher lifetime earnings – either directly in the labour market or in further specialisations – for the short-term necessity of contributing to the family income. The risk is that some talented lower-income students fail to achieve their potential by selecting programmes ill-suited to their talents and interests and that limit their future opportunities in education as well as in the labour market. Beyond generating sub-optimal individual outcomes, this phenomenon would also reduce the efficiency of skills matching in the economy and inhibit productivity growth.

Far from all students in vocational secondary education programmes want or need to apply to higher education. These programmes have been especially designed to teach their graduates the skills required to enter the labour market directly after school. The ability to find work related to the field of study quickly can be a key motivating factor in choosing a vocational programme. At the same time, some students may find that they want to specialise further in their field, or broaden their academic abilities, and these students should be given a fair opportunity to enter higher education.

Vocational programmes are not designed to be compatible with the requirements to enter the National Access Competition

The first option that vocational students who wish to enter higher education have is via the National Access Competition, but vocational programmes will typically not include classes in subject areas that prepare students for the national exams required by the National Access Competition. Since their curriculum will not prepare them for the national exams, vocational students who want to take national exams need to organise their own learning in the subjects required by their desired higher education programme (MCTES, 2024[16]). Students then need to study for these exams in their own time or receive special tutoring through their school or through extracurricular services. While not being guaranteed instruction in classes that prepare students for national exams, some schools reportedly offer some form of informal or formal guidance for students who want to go through this route.

Beyond not receiving formal teaching on the relevant course content, the barriers to study for national exams are raised by vocational students' relatively long schedules throughout upper secondary education. While students in general tracks enjoy a more sparsely populated schedule in the final year of upper secondary education which can allow them to improve their national exam grades or prepare for exams in subjects that they did not previously study, vocational students follow a curriculum where scheduled hours remain high in the final year of studies in order to continue furthering their skillset.

The recent changes in the requirements for the number of national exams needed to enter the National Access Competition have raised the barriers for vocational students to enter. Starting with the 2025/26 cohort, candidates need to submit two to three subject exam results in the application process, which is an increase from the previous requirement of one to three exam results (DGES, 2023[2]) (Box 3.2). With the aim of at least holding the share of vocational students who enter higher education constant in the face of this change, and aiming to increase it in the long term, the Ministry could strengthen the two alternative pathways

available to vocational students: the special competitions for holders of vocational secondary qualifications (dual certification) and the short-cycle CTeSPs.

3.3.2. Special competitions and short-cycle programmes can help provide reliable pathways to higher education

Special competitions for vocational students are institution-based and voluntary

The second option to enter higher education for students in vocational upper secondary tracks is via special competitions held for study places in specific programmes (DGES, 2024[26]). Different special competitions cater specifically to various groups of candidates include – among others – special competitions for holders of dual certification diplomas (vocational) and special competitions for short-cycle CTeSPs (DGES, 2024[26]). Institutions can open study places through special competitions alongside study places opened through the general access route.

However, while some special competitions are mandatory for institutions, the special competitions for holders of dual certification are voluntary and only a few study places are open for these applicants (MCTES, 2024[16]). For instance, the publication of available study places in 2025 for the academic year 2025/26 specified that 55 956 study places were to be opened in the general access regime in the public sector, with the addition of 20 862 study places in special competitions and special regimes. Out of all study places in public institutions, only 1.5% were allocated to the special competition for students with dual certification (i.e. vocational students). In the private sector, 18 831 study places were offered through the general access regime, with an additional 6 149 offered through special competitions and special regimes. Out of all the study places offered, 3.4% were opened through the special competition for students with dual certification (DGES, 2025[27]).

Study places offered through special competitions have historically been less straightforward for institutions to offer since institutions need to organise the selection process and more complicated for students to apply to since they had to take a test at each institution, compared with study places offered through the general access route. However, efforts are being made to streamline the system. First, it is positive that students can now access a central applications system for all public institutions on a single online platform, managed by DGES, rather than applying locally to each institution (DGES, 2025[28]). Second, it is good that institutions are slightly mitigating the challenge of designing, organising and assessing entry exams that candidates take instead of the national exams by joining the exam calendars of their larger group of co-ordinating institutions, called consortia, where institutions are organised by geography, with consortia in the north, centre, and south, including islands. This means that students' entrance exam results are valid for study places within the consortia. Only three institutions still offer entry exams outside of their consortia (DGES, 2025[28]).

Another element where there is possibility for further development is in the publication of previous years' entry exams. Contrary to students preparing for the national exams, students applying through the special competitions typically do not have access to previous years' exams to help in their preparation. It is therefore promising that the University of Algarve has reportedly started correcting for this imbalance by publishing old versions of their entry exams in order to prepare students for the type of exercises that they will be asked to do. It would also be positive if these simplifications encouraged institutions to allocate more study places to special competitions for holders of dual certification, in co-ordination with the ministry in change of higher education (Diário da República, 2025[29]).

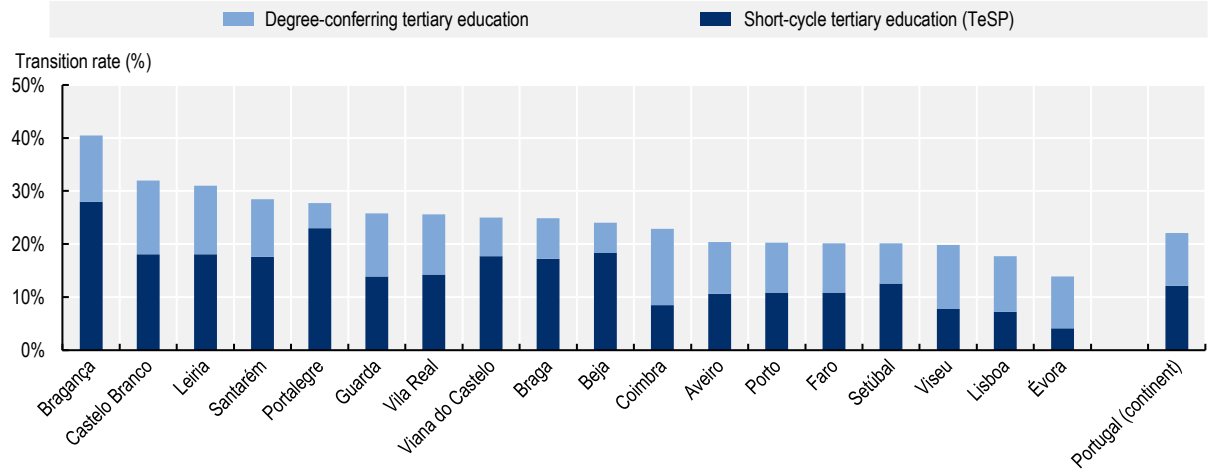
Two-year professional courses are a promising tool to widen opportunities to develop specialised skills through higher education

The final option for vocational students to access higher education is through short-cycle programmes, CTeSPs. Since their introduction in 2014, CTeSPs have been offered in increasing number by polytechnic

institutes and, according to project focus group participants, have had a positive impact on the accessibility to higher education for students from low-income backgrounds. These programmes are more accessible than traditional bachelor's programmes since the entry requirements in terms of academic grades are lower. Project interviews indicate that application processes are also perceived as more straightforward than the National Access Competition. This holds true in observed transition patterns too. Of students who had completed a vocational secondary education programme, around half of those who transitioned into higher education immediately following their secondary education graduation entered via a CTeSP (Figure 3.4).

Figure 3.4. A little over half of the vocational students who transition into higher education enrol in short-cycle CTeSPs

Situation one year after leaving vocational secondary education, by district, 2023/24



Note: Districts are ranked in descending order of total transition rates (degree-conferring higher education and short-cycle education). Data excludes island regions.
Source: DGEEC (2024[1]), Table 13, Transição entre o ensino secundário e o ensino superior 2022/2023 -> 2023/2024.

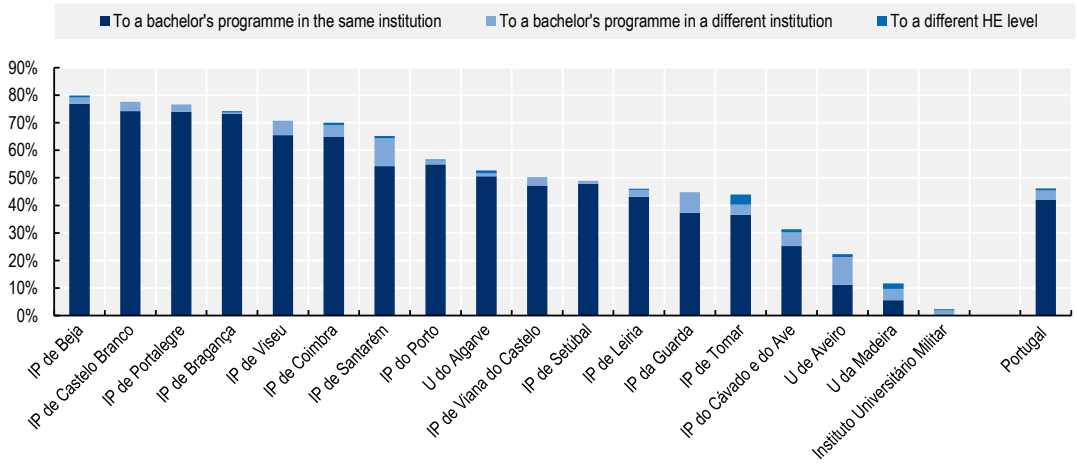
Participants in project focus groups report that many students appreciate that CTeSPs are tailored to the local labour market and the opportunity to immediately learn a profession, since this can facilitate a swift entry into the labour market on graduation. Project focus group participants report that this optionality helps create a sense of security, allowing students to keep both vocational and academic paths open; CTeSPs allow students to choose whether to pursue further studies or start working in a profession. This holds up in outcomes observed in the data: 45% of CTeSP graduates went on to study for a bachelor's degree in 2021/22, with a great majority staying within the same polytechnic institute (Figure 3.5).

During interviews with stakeholders held for this project, institutions report that they allow students in some programmes to transfer credits from their CTeSP to a bachelor's degrees. However, stakeholders also report that this merely tends to make the bachelor's degree less intensive, since certain credits are transferable (depending on the programme and institution). The project team did not hear of a situation where CTeSP students were able to move directly on to the second year in a bachelor's programme.

During interviews conducted for this project, stakeholders in institutions that provide CTeSPs reported that the comparably short duration of two years lowers barriers for students who would not have considered studying for a bachelor's degree level due to the time commitment it requires. Stakeholders report that once students start on CTeSPs, they tend to gain confidence and insight into what it means to pursue higher education, which in turn inspires many to continue to a degree-conferring programme.

Figure 3.5. Nearly half of CTeSP graduates across Portugal transition to a bachelor's programme, although there is considerable variation across institutions

Proportion of CTeSP graduates in 2021/22 who transition to a bachelor's programme or a different higher education level programme in 2022/23, by institution



Note: In the figure, U refers to "*Universidade*" or "University" and IP refers to "*Instituto Politécnico*" or Polytechnic Institute". Universidade de Trás-os-Montes e Alto Douro, Escola Superior Náutica Infante D. Henrique, and Universidade dos Açores are excluded due to small sample sizes.
Source: DGEEC (2024[30]), Prosseguimento de estudos entre os diplomados em Cursos Técnicos Superiores Profissionais, 2017/18 a 2021/22.

Internationally, foundation and bridging courses have been used as one approach to offering a viable path for vocational students and students with lower secondary education leaving grades while keeping in place the original features of the educational system. For example, the FEE-FREE Uni Ready and other enabling courses in Australia aim to close key gaps in subject-specific knowledge and study skills that are necessary to successfully complete a higher education programme (Box 3.6).

Some institutions in Portugal have implemented similar foundation years – or year 0 courses – that aim to close gaps in academic preparedness. Currently, these courses tend to target international students who arrive in Portugal with the need to improve their skills in Portuguese as well as in other subjects. However, Year 0 courses in Portugal tend to be associated with relatively high tuition fees, they do not confer any credits, and they do not guarantee entry to a higher education programme on completion.

By comparison, the role of foundation courses might be better played by CTeSPs in Portugal. Contrary to Year 0 alternatives, CTeSPs are resourced by government funding, provide eligibility to student financial support, confer credits as a stand-alone programme and are well integrated in the current education system. It is possible that some CTeSPs are well suited to prepare students for continued education while others primarily prepare students for the local labour market. It would be useful to review the design and use of programmes to better understand if CTeSPs could fulfil the dual purpose of functioning as possible foundation courses for further study in the same field, as well as a direct route to labour market entry.

While short-cycle programmes are promising as a tool for widening access and completion in higher education and have lowered barriers to entry for vocational students in particular, some information barriers remain. Candidates who want to apply to CTeSPs have lacked centralised information accessible in one place about the available courses, their individual requirements and the separate admission processes. This has been inherent in the process, since CTeSPs are separate from the general access route – which is part of their appeal – and criteria for admission, assessments and evaluations, and final admission are organised by institutions (DGES, 2024[31]).

It is positive that application guides – similar to those traditionally sent to students in general secondary education programmes – have been made available to students in vocational orientations as promised by MCTES in 2023 (DGES, 2023[2]). However, these guides still lack CTeSPs as well as further educational opportunities and labour market prospects associated with each option. There is therefore scope to further strengthen alternative pathways to bachelor's degrees via special competitions for holders of dual certification (vocational students) and holders of short-cycle CTeSPs.

Beyond acting as a short-cycle qualification with direct labour market relevance in its own right, CTeSPs also seem to act as an entry point to a bachelor's programme since a considerable share of CTeSP graduates transition into a bachelor's programme upon completion of their programme. Although this was not the intention of CTeSPs, it is an interesting development.

It would be useful to conduct a review of the current design, use and adequacy of current CTeSPs to fulfil the dual purpose of providing a short-cycle course and an entry route to higher levels of study. It would be important to understand its potential as a developed integrated pathway, recognising that not all CTeSPs may be suitably integrated with bachelor's programmes and always keeping the option to graduate from the independent two-year CTeSP programme.

If deemed appropriate given the findings from a review of the CTeSPs, the Ministry could build on the existing credit recognition between CTeSP-level courses and bachelor-level courses, by considering integrated pathways in cases where there is already significant overlap between a CTeSP and the first-year courses for a bachelor's degree. For example, Ireland has been piloting linked pathways between short-cycle programmes and bachelor's degrees, through "Tertiary Degrees". Portugal might draw lessons from these pilots in Ireland to experiment with well-integrated CTeSP-bachelor programme route, considering the possibility of completing the combined CTeSP-bachelor programme in four years rather than five (Box 3.6).

Box 3.6. Alternative pathways to higher education in Australia and Ireland

Universities receive central funding to deliver **FEE-FREE Uni Ready courses in Australia** which provide nationally regulated foundation programmes to students in need of extra preparation. A large majority of students in FEE-FREE Uni Ready courses (88%) access these courses free of charge through a Commonwealth-supported study place (Australian Department of Education, 2024[32]). Universities receive a contribution through the Commonwealth Grant Scheme at a higher rate than other courses to account for non-payable student contribution.

A good example of a specific FEE-FREE Uni Ready course is **the Open Foundation programme at University of Newcastle, Australia,** which delivers free and open-access courses that combine teaching in key subject matter and foundational concepts and skills for study. The courses are designed by "enabling teams" in collaboration with teaching staff in the associated faculty. In addition, students receive wrap-around support from enabling teams who assist students in dealing with a range of challenges that they experience and connect students with the other types of support they need. Established in 1974, the Open Foundation programme has supported over 70 000 students through a university education and nearly one-in-five students who graduated from the University of Newcastle in the past 10 years entered via the programme (Australian Department of Education, 2024[32]).

Ireland has been piloting "Tertiary Degrees", as part of an effort to re-design the system of programmes, credentials and transitions between post-secondary further education and higher education. Tertiary Degrees are co-ordinated by the National Tertiary Office and developed by the Education and Training Boards responsible for vocational education and training, together with higher education institutions.

Policy recommendations

Key finding:

Students from vocational secondary education programmes who want to transition to higher education experience higher barriers to entry than students from general programme orientations, raising barriers to widening access to higher education.

Recommendation

3. Strengthen alternative pathways to bachelor's degrees via special competitions for holders of dual certification (vocational students) and holders of short-cycle diplomas (CTeSPs).

References

AACRAO (2023), *New exam model for Portugal 11th grade students*, https://www.jn.pt/7619719631/novo-modelo-de-exames-para-alunos-do-11o-ano/. [20]

Australian Department of Education (2024), *Australian Universities Accord Final Report*, Australian Department of Education, https://www.education.gov.au/australian-universities-accord/resources/final-report. [32]

Byrne, D. et al. (2013), *An Evaluation of the HEAR and DARE Supplementary Admission Routes to Higher Education*, National University of Ireland Maynooth, https://mural.maynoothuniversity.ie/8969/1/DB-Evaluation-2014.pdf. [23]

CNE (2024), *Recomendação abril 2024: Explicações/ 'educação (na) sombra': relação com o currículo, o trabalho dos professores e as desigualdades*, Conselho Nacional de Educação, https://www.cnedu.pt/content/noticias/Recomendacoes_Abril_2024/Recomendacao_Explicacoes_final.pdf. [7]

DGEEC (2024), *Prosseguimento de estudos entre os diplomados em Cursos Técnicos Superiores Profissionais, 2017/18 a 2021/22*, https://www.dgeec.medu.pt/art/ensino-superior/estudos/areas-de-estudo/64f8564ad128bc76d4fba91f. [30]

DGEEC (2024), *Transição entre o Secundário e o Superior: 2022/2023 > 2023/2024*, DGEEC, https://www.dgeec.medu.pt/art/ensino-superior/estudos/areas-de-estudo/64f855f0d128bc76d4fba91e#artigo-67630f24250a0aff719dff68. [1]

DGEEC (2023), *Estatísticas: 1.ª, 2.ª e 3.ª Fases*, https://www.dges.gov.pt/pt/pagina/regime-geral-ensino-superior-publico-concurso-nacional-de-acesso. [22]

DGEEC (2021), *Frequência de atividades complementares de apoio ao estudo no final do secundário*, DGEEC, https://www.dgeec.medu.pt/api/ficheiros/657a1be6c02216ed489b9968. [9]

DGEEC (2021), *Table Q97 - Alunos por tipo de certificação, natureza do estabelecimento de ensino e média global das classificações, "Estudantes à Saída do Ensino Secundário, 2020/21"*, DEGADI/DGEEC. [3]

DGES (2025), *Acesso ao Ensino Superior 2025/26 | Vagas para Regime Geral, Concursos e Regimes Especiais de Acesso ao Ensino Superior*, https://www.dges.gov.pt/pt/noticia/acesso-ao-ensino-superior-2025-2026-vagas-para-regime-geral-concursos-e-regimes-especiais-0. [27]

DGES (2025), *Acesso ao Ensino Superior para Diplomados de Vias Profissionalizantes*, https://www.dges.gov.pt/pt/pagina/acesso-ao-ensino-superior-para-diplomados-de-vias-profissionalizantes. [28]

DGES (2024), *Cursos Técnicos Superiores Profissionais*, https://www.dges.gov.pt/pt/pagina/cursos-tecnicos-superiores-profissionais. [31]

DGES (2024), *O Ensino Superior em Portugal 2021-2023*, DGES, https://wwwcdn.dges.gov.pt/sites/default/files/o_ensino_superior_em_portugal_2021-2023_documento_final_172024.pdf. [26]

DGES (2023), *Comunicado MCTES | Alterações à conclusão do ensino secundário e acesso ao ensino superior*, https://www.dges.gov.pt/pt/noticia/comunicado-mctes-alteracoes-conclusao-do-ensino-secundario-e-acesso-ao-ensino-superior. [2]

Diário da República (2025), *Despacho n.º 528/2025, de 10 de janeiro*, https://diariodarepublica.pt/dr/detalhe/despacho/528-2025-902932741. [29]

Diário da República (2023), *Decreto-Lei n.º 64-A/2023, de 31 de julho*, https://diariodarepublica.pt/dr/detalhe/decreto-lei/64-a-2023-216512899. [5]

ePortugal (2023), *New conditions for completing secondary education and accessing higher education*, https://eportugal.gov.pt/en/noticias/novas-condicoes-para-concluir-ensino-secundario-e-aceder-ao-ensino-superior. [19]

Jobs and Skills Australia (2025), *Opportunity and Productivity: Towards a Tertiary Harmonisation Roadmap*, https://www.jobsandskills.gov.au/publications/opportunity-and-productivity-towards-tertiary-harmonisation-roadmap. [25]

Ly, S., E. Maurin and A. Riegert (2020), "A pleasure that hurts: The ambiguous effects of elite tutoring on underprivileged high school students", *Journal of Labor Economics*, Vol. 38/2, pp. 501-533, https://doi.org/10.1086/705925. [10]

MCTES (2024), *Revisão do Sistema de Acesso ao Ensino Superior - 2022/2023*, Ministério da Ciência, Tecnologia e Ensino Superior, https://www.dges.gov.pt/pt/noticia/revisao-do-sistema-de-acesso-ao-ensino-superior-2022-2023-marco-2024. [16]

Murphy, R. and P. Silva (2024), *Keeping It in the Family: Student to Degree Match*, IZA Discussion Paper No. 16931, https://www.iza.org/publications/dp/16931. [4]

Nata, G., M. Pereira and T. Neves (2014), "Unfairness in access to higher education: a 11 year comparison of grade inflation by private and public secondary schools in Portugal", *Higher Education*, Vol. 68, pp. 851-874, https://doi.org/10.1007/s10734-014-9748-7. [13]

Neves, T., H. Ferraz and G. Nata (2017), "Social inequality in access to higher education: grade inflation in private schools and the ineffectiveness of compensatory education", *International Studies in Sociology of Education*, Vol. 26, pp. 190-210, https://doi.org/10.1080/09620214.2016.1191966. [17]

OECD (2023), *Upper secondary general education (ISCED2011 level 3 (general programmes)), Students' instruction time in compulsory education*, OECD Publishing, Paris, https://stats.oecd.org. [6]

OECD (2018), "OECD Reviews of School Resources: Portugal 2018", *OECD Reviews of School Resources*, OECD Publishing, Paris, https://doi.org/10.1787/9789264308411-en. [8]

Posso, C., E. Saravia and P. Uribe (2023), *Acing the Test: Educational Effects of the SaberEs Test Preparation Program in Colombia*, Borradores de Economía, https://repositorio.banrep.gov.co/bitstream/handle/20.500.12134/10642/be_1237.pdf. [12]

Silva, P. et al. (2025), "Public and Private School Grade Inflations Patterns in Secondary Education", *IZA Institute of Labor Economics*, Vol. IZA Discussion Paper No. 16016, https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4396103. [15]

Silva, P., L. Morin and A. Cardoso (2024), *Avaliação de impacto do contingente prioritário para beneficiários de Ação Social Escolar (ASE-A)*, https://www.edulog.pt/storage/app/uploads/public/679/173/2e6/6791732e6125c473449953.pdf. [21]

Stronati, C. (2023), *The design of upper secondary education across OECD countries: Managing choice, coherence and specialisation*, https://doi.org/10.1787/158101f0-en. [24]

Tavares, O. et al. (eds.) (2022), *Data and Refections on Access-Transition to Higher Education in Portugal*, https://doi.org/10.1007/978-3-030-69691-7_7. [14]

Teixeira, P. et al. (2022), "Competition and diversification in higher education: Analysing impacts on access and equity in the case of Portugal", *European Journal of Education*, Vol. 57, pp. 235-254, https://doi.org/10.1111/ejed.12501. [18]

Welsh Government (n.d.), *The Seren Academy*, https://www.gov.wales/seren-network-overview. [11]

Notes

[1] These bespoke data were provided by special request to DGEEC and are not directly comparable with published tables. The bespoke tables use the datasets Education Statistics (EE) from 2022/2023, Survey on the Registration of Enrolled and Graduated Higher Education Students (RAIDES) from 2023/2024 (students enrolling in the first year for the first time). This is different from the official statistics from DGEEC. In the bespoke tables from DGEEC, students are considered to be in a) general study orientation if they take part in scientific-humanistic courses; b) vocational study orientation if they take part in courses of double certification (including technological courses, vocational courses (*cursos profissionais*), learning courses (*cursos de aprendizagem*), specialised artistic courses (*cursos artísticos especializados*); and c) in other study orientations if they take part in courses targeted to adults. Students in recurrent education (*ensino recorrente*) are excluded. This is different from the official statistics from DGEEC, where students are considered to be in a) vocational programmes only if they take part in vocational courses (*cursos profissionais*); and b) in other study orientations if they take part in courses with specific plans (*cursos com Planos Próprios);* and specialised artistic courses (*cursos artísticos especializados*).

[2] The priority intervention educational territory programme is an educational policy measure aimed at schools located in geographical areas with a high number of children and young people at risk of social vulnerability. It aims to promote inclusion and educational success, improve the quality of learning and combat school dropout.

[3] TEIP schools were established to promote educational access and success, social equity goals, and economic growth. No significant differences are found between public schools and TEIP schools in this study (Silva et al., 2025[15]).

[4] The bespoke tables from DGEEC are not directly comparable with the official data from DGEEC. The bespoke tables use the datasets Education Statistics (EE) from 2021/2022, the Secondary Education National Exams database (ENES) from 2022, Survey on the Registration of Enrolled and Graduated Higher Education Students (RAIDES) from 2022/2023 (students enrolling in the first year for the first time). In the bespoke tables from DGEEC, students are considered to be in a) general study orientation if they take part

in scientific-humanistic courses; b) vocational study orientation if they take part in courses of double certification (including technological courses, vocational courses (*cursos profissionais*), learning courses (*cursos de aprendizagem*), specialised artistic courses (*cursos artísticos especializados*); and c) in other study orientations if they take part in courses targeted to adults. Students in recurrent education (*ensino recorrente*) are excluded. This is different from the official statistics from DGEEC, where students are considered to be in a) vocational programmes only if they take part in vocational courses (*cursos profissionais*); and b) in other study orientations if they take part in courses with specific plans (*cursos com planos próprios*); and specialised artistic courses (*cursos artísticos especializados*).

[5] These bespoke data were provided by special request to DGEEC and are not directly comparable with published tables. The bespoke tables use the datasets Education Statistics (EE) from 2022/2023 and Survey on the Registration of Enrolled and Graduated Higher Education Students (RAIDES) from 2023/2024 (students enrolling in the first year for the first time). This is different from the official statistics from DGEEC. In the bespoke tables from DGEEC, students are considered to be in a) general study orientation if they take part in scientific-humanistic courses; b) vocational study orientation if they take part in courses of double certification (including technological courses, vocational courses (*cursos profissionais*), learning courses (*cursos de aprendizagem*), specialised artistic courses (*cursos artísticos especializados*); and c) in other study orientations if they take part in courses targeted to adults. Students in recurrent education (*ensino recorrente*) are excluded. This is different from the official statistics from DGEEC, where students are considered to be in a) vocational programmes only if they take part in vocational courses (*cursos profissionais*); and b) in other study orientations if they take part in courses with specific plans (*cursos com planos próprios*); and specialised artistic courses (*cursos artísticos especializados*).

4 Direct and indirect student financial support

This chapter reviews government-funded direct financial support such as grants and housing support, and indirect financial support including student housing and meals, for higher education students. It investigates the adequacy of recent government efforts to expand the eligibility to state-funded study grants and grant supplements available to mobile students, considering both the level of grants and challenges with the implementation of eligibility criteria. The chapter then considers the resources that higher education institutions receive as a contribution towards the provision of indirect financial support to students. The chapter finally considers implications for policy.

4.1. Introduction and key findings

The upfront cost of participating in higher education, including tuition fees, transport, food and housing, along with the opportunity cost of foregoing an income from paid work, are important considerations for students from lower-income families, regardless of their sufficient academic ability to be successful. In some cases, students and their families might also think about the financial trade-offs where the upfront cost is offset by future reward in terms of obtaining a dream job, personal satisfaction, or gaining high returns on the labour market. In these cases, the decision to participate in higher education is influenced by knowledge and beliefs about opportunities.

In Portugal, the financial support system includes universally subsidised tuition fees in public higher education institutions, subsidised transport and canteens for students and means-tested study grants, family benefits, and housing support. The direct and indirect financial support to students in higher education is distributed primarily by Social Action Services (Serviço de Ação Social, SAS) in higher education institutions.

This chapter first considers the adequacy of the current financial support system for students living with their parents and the special provisions for mobile students. Subsequently, it investigates challenges related to the administration of grants and the implementation of allocation criteria. Finally, it reiterates the important role played by institutions in the provision of indirect financial support and non-financial services, and highlights discrepancies in the allocation of the core operating grant.

Key findings and recommendations

Key findings

Direct and indirect financial student support is important to increase opportunities for students to participate in higher education. Portugal has a solid foundation of direct and indirect financial supports to students, including substantially subsidised tuition fees, housing, meals and the provision of social support services (in public institutions). These universal policies are combined with means-tested support in the form of study grants and extra support for mobile students.

Much of the means-tested support relies on eligibility to the study grant, and it is promising that recent government efforts have extended the eligibility criteria of the study grant to more students. However, it has resulted in students from a wide range of income backgrounds receiving public student grants at the minimum level, which primarily aim to cover students' tuition fees.

This conception of the role of grants is likely misaligned with students' real needs given recent reductions in fees and concomitant increases in living costs. The government could consider increasing the grant contribution to include living costs for targeted low-income groups. Even with a well-established grant system, students can experience credit constraints when it comes to paying for living costs while studying. This applies particularly to mobile students. It could therefore be valuable to investigate the potential role of a developed state-guaranteed loan to address credit constraints during studies, as a complement to the grant system.

While students are still more likely to study in their local area, the proportion of mobile students has risen in recent years, putting pressure on support for mobile students. The government has taken action to increase the financial support for low-income mobile students, notably by investing in the stock of student accommodation, but more could be done to address the gaps in provision in targeted geographical areas. The government has also expanded support for housing costs through the housing supplement available to mobile students who have not been allocated a place in subsidised student residences, by widening eligibility and increasing the level of support available.

However, complex criteria and applicant evaluation system for the study grant and the housing supplement make case management time-consuming and the final level of grants unpredictable. In part, this is because the grant eligibility criteria in higher education differ from the eligibility criteria for the School Social Action (ASE) grants available in secondary education, on which expectations and preliminary allocations through automatic registrations are based. The housing supplement relies on study grant status but also requires formal receipts of payment in a highly informal private rental market, compounding challenges to access support.

Finally, variations in the funding that institutions allocate to social student support services from their budgets can contribute to differences in the quality of these services across institutions. The re-institution of a funding formula for core funding to institutions provides an opportunity for the government to monitor and, if needed, provide guidance to institutions on funding allocations to social support services in future. This can help ensure that vulnerable students receive equitable non-financial support across the country.

Policy recommendations

1. Revise the formula for calculating the means-tested grant with the aim of making an explicit contribution to tuition fees and an explicit contribution to living costs and consider the possibility of increasing the generosity of living cost contributions to the lower-income and mobile grant recipients.
2. Explore the possibility of introducing a state-guaranteed living cost loan to students where the state and students jointly contribute to the portion of necessary living costs during studying that are not covered by the grant, ensuring cross-party, long-term commitment and attention to address culturally important concerns related to taking on loans.
3. Continue to improve the accessibility of affordable student housing options through targeted investment and collaborations with regulated private providers.
4. Revise the eligibility criteria for the means-tested grant with the aim of ensuring that the grant system is implementable in a predictable, fair and effective manner.
5. Revise the eligibility criteria for the housing supplement with the aim of ensuring that the system is implementable in a predictable, fair and effective manner.
6. Commission an analysis of the factors that explain variations in the per-student levels of investment in student social action services between public higher education institutions.

4.2. Direct and indirect financial student support is important to increase opportunities for students to participate in higher education

Like many other OECD member countries, Portugal combines state-subsidised tuition fees with further direct financial support in the form of means-tested grants for the lowest-income families to pay the educational expenses and living costs remaining after universal subsidies have been applied. Despite this good foundation for student support, challenges related to financial barriers to participation in higher education remain.

4.2.1. Portugal offers generous tuition fees subsidies to students enrolled in the public sector

The government uses a range of tools to provide direct and indirect financial support to students, including subsidised tuition fees, grants and subsidised student housing (Box 4.1). The following sections will consider

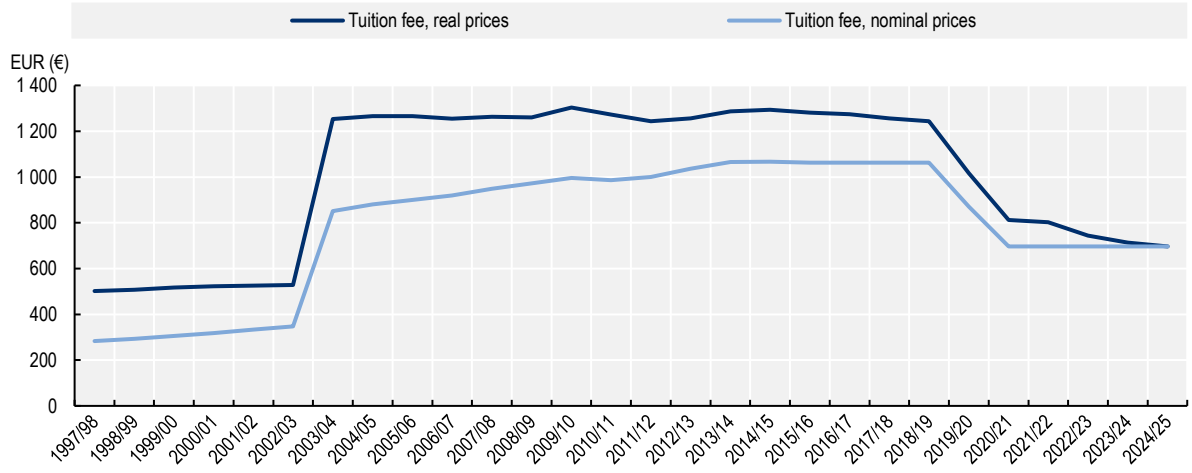
the key elements of the government's financial support system and discuss opportunities for further strengthening the system.

The Portuguese government subsidises tuition fees in the public sector, which enrolled 80% of students in 2023/24 (see Chapter 2). Since 2020, the government has fixed the maximum tuition fee that higher education institutions in the public sector can legally charge Portuguese and European Union (EU) students via the annual state budget. The maximum legal fee has been kept constant in nominal terms since 2021. This maximum legal fee applies for short-cycle Professional Higher Technical Courses (CTeSPs), bachelor's degrees, integrated master's degrees and second-cycle master's degrees required to access regulated professions. This policy ensures that tuition fees in the public sector remain at a level at which they constitute a relatively small part of the overall costs associated with attending higher education in Portugal.

Lowering tuition fees has been a government objective in recent years. The government in Portugal reduced tuition fees for first-cycle bachelor's degrees in the public sector, from EUR 1 063 a year in 2018/19 to EUR 697 a year in 2020/21, remaining at that nominal level until 2024/25. This means that in real terms, tuition fees in 2024/25 are below levels previously seen in 2003/04 (Figure 4.1). Compared with other countries where tuition fees exist, the direct cost of studying in Portugal is modest. Portugal is similar to a cluster of European countries – including for instance Austria, Belgium, France, and Italy – with low public sector tuition fees (Teixeira et al., 2022[1]; Eurydice, 2022[2]; OECD, 2023[3]).

Figure 4.1. The Government has kept tuition fees in public institutions low in recent years

Real and nominal maximum regulated annual tuition fees in public higher education institutions, Portugal, 1997/98-2024/25

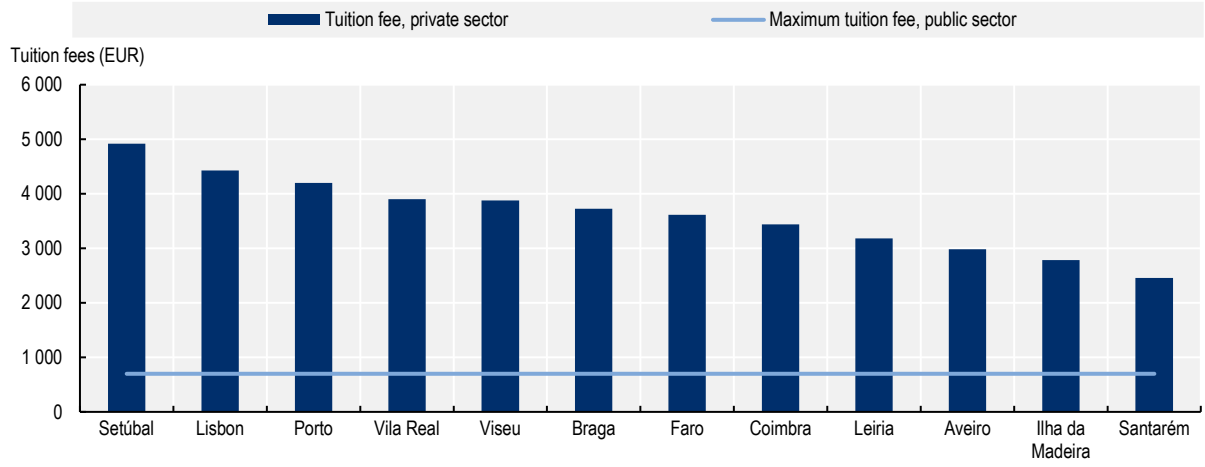


Source: Morgado (2018[4]); DGES (2024[5]); OECD (2025[6]); and Economia e Finanças (2018[7]).

Private institutions are able to freely set tuition fees throughout all their study cycles. This means that fees are generally higher in private institutions than in public institutions in Portugal (Figure 4.2). While attending a private institution can therefore push up the costs of studying for students, the availability of private sector alternatives in the home district has been shown to reduce the likelihood of enrolment in a higher education institution in another district in Portugal (Lourenço et al., 2020[8]). As such, private provision fills some of the gap in the market in offering study places in locations where competition for places in the public system is highly competitive, where students with slightly lower grades would otherwise be excluded or need to relocate. The higher tuition fees in private provision nevertheless create another barrier for students from lower-income families if they are not able or willing to move to another district to attend lower-cost, public higher education.

Figure 4.2. Tuition fees in the private sector are significantly higher than those in the public sector

Average annual (estimated) tuition fees for bachelor's degrees in private universities and polytechnic institutes, by district, Portugal



Note: Tuition fees are established by each private higher education institution, annually, and by course, cycle and diploma in the case of CTeSPs. These data detail approximate information only. The information was collected from student requests of grants from social support. The sample includes minimum and maximum values for a first-year cycle, CTeSPs, and courses with a minimum of 60 ECTS. This information was subsequently cross-referenced with data from higher education institution units and courses. The data refer to the average tuition fee for each programme between the minimum and maximum registered tuition fee for a first-cycle degree, and the tuition fee shown in the chart is the average tuition fee across schools in institutions for which data exist in each district.
Source: Bespoke tables from the Portuguese Directorate-General for Higher Education (DGES).

Box 4.1. Lower-income students can benefit from financial support from various sources

Tuition fees are regulated by law for the first and second cycles of studies in the public sector and have been kept constant in nominal terms since 2021 in response to the COVID-19 pandemic.

State-funded **higher education study grants**, or *bolsas de estudo*, are means-tested, state-funded payments to students enrolled in higher education programmes. The grant is awarded for a full academic year. The eligibility criteria are set by the Ministry and are distinct from those used for the allocation of family benefits and School Social Action grants in secondary education.

Subsidised student housing in residences is available for mobile higher education students at prices that are fixed below market rates. Study grant recipients in subsidised student housing receive a housing supplement making this form of accommodation free of charge.

Students who apply for, but are not allocated, a room in residences can be eligible for a **means-tested housing supplement** to contribute to rent in the private market.

The **"*Mais Superior*" programme** aims to support higher education enrolment in areas of Portugal where there is currently lower demand. It targets low-income students who enrol in a target institution in a NUTS III region (small geographical units) different from the one of their parental home.

Family benefits, or the "*Abono de família para crianças e jovens*", is a means-tested, state-funded benefit targeting families with low incomes with the aim to alleviate financial difficulties experienced by children and students up to the age of 24. Parents continue to be eligible for family benefits for students in higher education, but not for adult children who work.

There are several **tax credits** available to parents up to different caps for different spending categories. These include tax credits for education and training costs, such as housing costs for mobile students, general family expenses and public transport costs.

Loans for higher education students have been suspended since 2015. However, in 2018, the EU-funded Human Capital Operational Programme (POCH), the Ministry for Science, Technology and Higher Education, and the Mutual Counter-Guarantee Fund (FCGM) opened a credit line for higher education students with mutual guarantee, which supplies loans to a small number of students.

Merit-based scholarships are state-funded monetary awards given to academically exceptional higher education students in the year following their achievements.

Municipality-funded scholarships to higher education students are available in some municipalities. These can have different values and eligibility criteria, including means-tested elements. Municipality-funded scholarships will typically count towards the total family income as calculated for the state-funded scholarships.

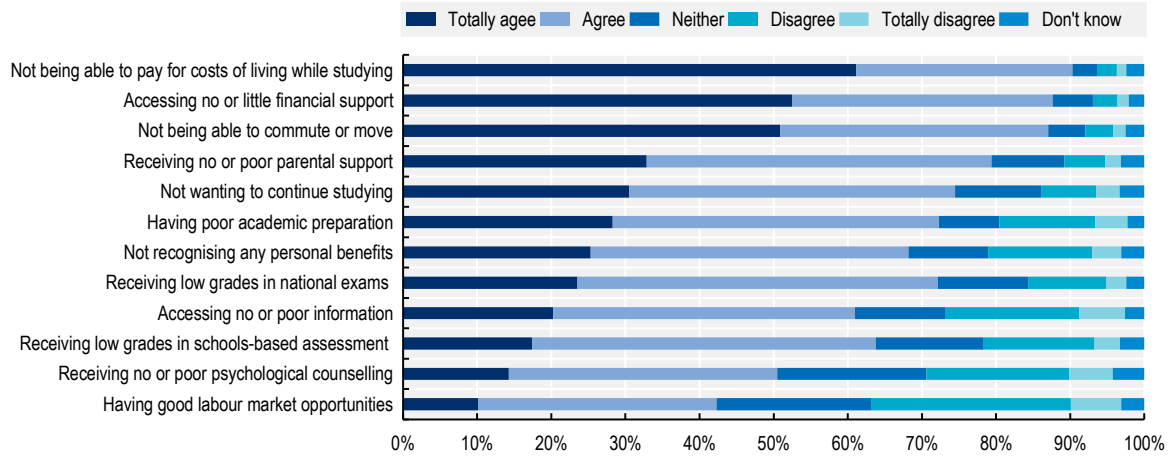
Institution-funded discounts and scholarships. Some (private) institutions provide discounted tuition fees to their higher education students on an ad hoc basis.

Source: Diário da República (2003[9]); Diário da República (2009[10]); Diário da República (2023[11]); Diário da República (2021[12]); Diário da República (2023[13]); Caixa Geral de Depósitos (2023[14]); ePortugal (2024[15]); and IGeFE (2018[16]).

However, supporting day-to-day and educational expenses – and the opportunity cost of missing out on potential labour market earnings for young people – is an important challenge for lower-income students and their families when it comes to pursuing higher education. During focus groups and stakeholder interviews held within the scope of this project, participants repeatedly emphasised the importance of families' financial challenges. Moreover, "Not being able to pay for living costs while studying" is the option most frequently identified by the project stakeholder survey participants when they were asked to rate the importance of different barriers to pursuing higher education for lower-income students. The other two most important factors identified by project stakeholder survey participants also involve financial barriers: not being able to commute or move and not accessing enough or any financial support (Figure 4.3).

Figure 4.3. Stakeholders report that the cost of living is the most important barrier to studying

To what extent do you agree or disagree that the following factors are barriers to participation in higher education for low-income students with whom you work?



Note: Only includes valid responses i.e. respondents completing the project stakeholder survey to the last page. N=2 062. The sample of this project stakeholder survey includes stakeholders in the education and higher education system. It is not necessarily representative.
Source: TSI Project Stakeholder survey, 2024.

4.2.2. Means-tested student grants aim to contribute to living costs for the lowest-income students and cover tuition fees at the minimum level

Subsidising tuition fees in public higher education institutions is a form of indirect financial support that covers a large majority of students by applying equally across institutions in the public sector. The government couples this quasi-universal subsidy with further direct financial support targeted to lower-income students in the form of means-tested study grants (Box 4.1). Portugal has a long-established system of student grants to students enrolled in public and private institutions, and recent annual adjustments have focused on expanding the eligibility criteria to include a greater number of students.

Overall, the financial support system in Portugal is well integrated into the system and provides a good foundation for students. Research from Portugal suggests that students receiving grants are less likely to drop out of their programme after the first year of studies and more likely to complete the credits necessary to continue receiving the grant compared with students with similar incomes who did not receive grants when controlling for student and programme characteristics. Similarly, receiving a grant can lead to an increased probability of graduating on time, with stronger effects among students who receive the grant for two or three years, compared to those who only receive it for one year (Guthmuller and Meroni, 2022[17]). International research from France and Germany also finds that a boost to the grant level to which students have access can help increase higher education enrolment (Box 4.2).

There may still be ways for Portugal to build on and improve the current grant system, particularly since research finds that student financial support only has a significant effect on enrolment when it provides support beyond simply covering tuition fees (Herbaut and Geven, 2020[18]). Although receiving the minimum grant allows students to cover the subsidised tuition fee and is helpful for students, it does little to alleviate concerns about living costs. The economic burden of living costs in relation to the value of the grants were highlighted by project stakeholder survey participants when asked to identify the greatest barrier to participation in higher education for lower-income students. One participant explains that: “the grant cannot support the full payment of the student's expenses (rent, household expenses, food, school expenses and transport, among others)".

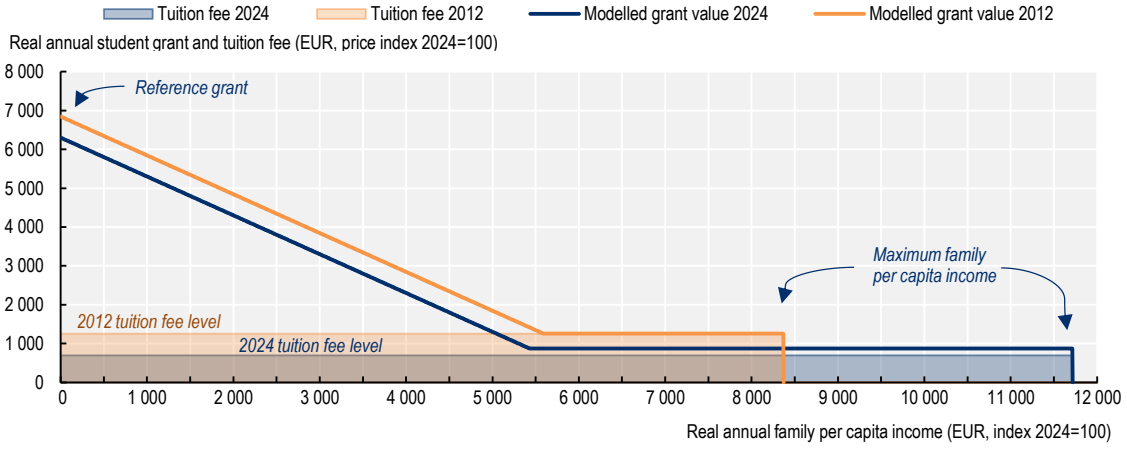
Eligibility to student grants have been extended at the minimum level where grants aim to cover public sector tuition fees while the level has been held constant

The study grant in Portugal has two purposes. First, it aims to cover tuition fees at the level of the maximum tuition fee chargeable in public institutions (flat part of the line in Figure 4.4). Second, it aims to contribute to living cost expenses for students from the lowest-income families (downward-sloping part of the line in Figure 4.4).

Recent government efforts have focused on expanding the eligibility criteria to provide the minimum grant level to a greater number of students. As such, the maximum per capita income that a family can have while still receiving the study grant has increased from 14 times the Social Support Index (IAS) plus the value of the public sector maximum tuition fee in 2012 to 23 times IAS in 2024 (with changes made to the criteria in 2017/18, 2020/21 and 2023/24). In real terms, this has shifted the maximum family per capita income to be eligible for a grant from EUR 8 365 in 2012 to EUR 11 713 in 2024. Figure 4.4 illustrates the expansion in the eligibility criteria as the shift from the orange line – representing the value and coverage of the grant in 2012 – to the blue line – representing the situation in 2024.

Figure 4.4. Portuguese authorities have focused on extending the eligibility to the grant to a broader set of lower-income recipients in recent years

Expected real value of the annual grant and tuition fee for Portuguese grant recipients, by real annual per capita family income, 2012 and 2024



Note: Real prices are shown in 2024 prices. The model assumes that the maximum legal tuition fee is paid and that all conditions other than family income are fulfilled, including, but not limited to, conditions related to citizenship, movable assets, course choice and credits completed. The reference student grant is calculated as 11 times the IAS plus the maximum legal tuition fee in both 2024 and 2012. The maximum family income is calculated as the IAS multiplied by 23 times in 2024 and the IAS multiplied by 14 plus the tuition fee in 2012. The model does not include supplements.
Source: DGAEP (2023[19]); OECD (2025[6]); Diário da República (2012[20]); and Diário da República (2024[21]).

While the government has gradually increased the maximum annual family per capita income allowed while receiving the grant, it has held the reference grant, or the maximum possible grant, constant. As illustrated in Figure 4.4, the reference grant determines the grant level that is allocated to living expenses for the lowest-income families. For these families, the annual student grant is calculated as the reference grant subtracted by the family per capita income, which is illustrated as the linearly downward-sloping parts of the blue and orange lines in Figure 4.4.

The reference grant has remained at 11 times the IAS value plus the maximum legal public sector fee between 2012 (EUR 6 842) and 2024 (EUR 6 299) (in 2024 prices). As such, the level of grant contribution to living costs, as well as the cut-off family per capita income where students start receiving only the minimum grant level (EUR 5 428), have remained largely unchanged (Figure 4.4).

The minimum grant level now applies to students within a wide range of family per capita incomes ranging from around EUR 5 428 per year or around EUR 11 713 per year (Figure 4.4). It could therefore be argued that any further expansions to the grant system could consider increasing the portion allocated to living cost expenses.

4.2.3. A potential avenue for further development of the study grant is to strengthen the role of financial support for living costs while studying

Previous governments in Portugal have recognised the value in providing a separate contribution towards living costs. In 2018, the minimum grant was increased from simply being equal to the maximum legal tuition fee in the public sector to 125% of the maximum fee. However, under these rules, grant recipients end up with less government support when the legal maximum tuition fee is reduced. This is because the value of the base student grants left over after tuition is paid – that is, the 25% top-up – shrinks when the tuition fee falls.

Portugal could consider whether the eligibility for living cost contributions should be expanded

It could be useful to revise the formula for calculating the means-tested grant with the aim of making one explicit contribution to tuition fees and another explicit contribution to living costs, thereby creating a separate "living cost allowance". This would allow the government to consider the possibility of adjusting the eligibility for, and generosity of, the "living cost allowance" independently from the minimum study grant (which primarily reimburses the tuition fee). The "living cost allowance" could, for example, specifically target lower-income and mobile students. The aim of such an exercise should be to make the system more predictable for prospective students. International examples that could be drawn on include, for instance, the approaches used for the grant systems in France and Germany (Fack and Grenet, 2015[22]; Steiner and Wrohlich, 2012[23]) (Box 4.2).

Going further, the government could consider the suitability of level of and eligibility for the living cost allowance. In 2024, students start receiving income-dependent living-cost contributions at an annual per capita income of EUR 5 428 (allocated according to the downward-sloping line in Figure 4.4). Given that this per capita income is roughly in line with the per capita income of a family of four where the parents are working full-time at the minimum wage,[1] there may be scope to reconsider whether the level and eligibility for living cost allowances could be made more generous (keeping in mind that there are further support for some mobile students, as discussed below).

Given that the coverage of student grants has been extended to students with higher family incomes, it would be reasonable to argue for slight increases in the tuition fees. While an end to any ambition to further reduce tuition fees could appear unfair to lower-income families, it would in fact be a progressive policy if the study grant allocation is well-targeted to lower-income students. It should be noted that this argument rests on an effective and timely allocation of the study grant, ensuring that the study grant and the housing supplement effectively reach their target groups.

Box 4.2. Means-tested grant systems in France and Germany

The **French means-tested student financial support scheme, "*Bourses sur critères sociaux*" (BCS),** provides means-tested support to higher education students who start studying before the age of 28. The level of support is dependent on parental income, whether the student has children and the distance to the study location from the parental home. There are eight levels of support grants (provided on top of the heavily subsidised tuition fees), from EUR 1 454 to EUR 6 335 per year for the 10-month study period (Government of France[24]). Researchers found that the top bracket covered approximately 90% of the eligible student's average living expenses in France in 2010 (Fack and Grenet, 2015[22]).

Using the discontinuities in the eligibility criteria and data from 2008 and 2009, research finds that a fee-waiver had small positive but statistically insignificant effects on enrolments, but that an additional grant of EUR 1 500 per year on top of the fee-waiver increased enrolments by 4.9 percentage points in the first year of undergraduate programmes and 3.9 points in the following year. EUR 1 500 (in 2011 euros) was estimated to cover a third of the average living expenses of eligible students who live away from home in 2010 (Fack and Grenet, 2015[22]).

The **German federal student financial assistance scheme**, based on the Federal Training Support Act, the **"*Bundesausbildungsförderungsgesetz*" (BAföG)** provides means-tested grants and interest-free loans to students in Germany. At the time of writing, the maximum allocation is EUR 934 per month, where half of the sum is provided as a grant and half as a loan. Using data from 1999-2005, when the BAföG covered around 20-25% of the student population, Steiner and Wrohlich (2012[23]) find that an increase of EUR 1 000 in student assistance from BAföG per year increased enrolment rates by 1.5% on average.

There are possible benefits of a state-guaranteed student loan system

Some OECD jurisdictions offer subsidised student loans as a complement to non-repayable student grants. In Portugal, the law currently permits student loans. In 2018, the EU-funded Human Capital Operational Program (POCH), the Ministry for Science, Technology and Higher Education (MCTES), and the Mutual Counter-Guarantee Fund (FCGM) opened a credit line for higher education students with mutual guarantee, which provides loans to a small number of students.

The government could go further to improve the conditions of the loan in order to make it more accessible. It could explore the possibility of introducing a state-guaranteed living cost loan to students with income-contingencies built into the repayment conditions. The aim of a developed loan system could be that the state and students jointly finance the portion of living costs that are not covered by the study grant.

Stakeholders highlight in project interviews that student loans have been tested in Portugal before. However, the unfavourable repayment conditions might have deterred students. Stakeholders also point towards a cultural aversion to loans as an important part of the reason for low take-up of loans in the past. Some reluctance to take on loans is to be expected, particularly in the early years after implementation, due to the large sums of money involved and a lack of certainty about the long-term stability of the system.

Therefore, it is particularly relevant that any introduction of a student loan in Portugal is planned as a part of a long-term strategy, with cross-party agreement and ear-marked long-term government funding from the national budget. Preferably, realistic options for a loan system should go through rigorous stakeholder consultations, including with students and their families, to understand concerns and what kind of repayment conditions would be acceptable.

Costed options for stakeholder consultations could draw inspiration from the Income Share Agreement loans from the José Neves Foundation, which can be considered as a starting point for understanding user

experience of student loans in Portugal, as well as from relevant international examples. For example, Lithuania operates private bank-facilitated loans with a repayment period of 15 years, Finland has a long-standing system of state-backed loan guarantees with private bank-facilitated loans with a repayment period of up to 30 years, while Canada provides means-tested student loans targeted to students with low family incomes, students with disability and students responsible for dependents (Box 4.3).

Box 4.3. Student loans to help pay for living costs are available in Lithuania, Finland and Canada

Lithuania has implemented a system of state loans and state-supported loans administered by a selected private bank with pre-established conditions. State loans and state-supported loans to students were introduced to contribute to covering tuition fees in higher education and living costs during full-time education. The state covers administration costs and provides a loan guarantee in case of default. The loan repayment term is 15 years. Loans are provided at variable interest rates set by the credit agreement with the bank, and in certain cases, the state pays interest rates for specific target groups (State Study Fund[25]).

Finland operates a system of state-backed loan guarantees that students can use to apply for a student loan with a commercial bank to help students cover their living costs while studying (to complement non-repayable study grants and fully subsidised tuition fees). Students are eligible for a loan guarantee if they also receive the means-tested state study grant from the social insurance authority Kela, or an adult education allowance. The loan guarantee is valid for up to 30 years from the first disbursement of loan funds and the interest payable on the loan and the repayment schedule are agreed between the student and the bank. However, graduates whose income falls below certain limits can apply for interest assistance from Kela (Kela[26]).

The **Canada Student Financial Assistance Program** started operating in 1964 as the Canada Student Loan Program and provides non-repayable grants and loans targeted to lower- and middle-income students to improve access to and affordability of higher education. Student finance is delivered through partnerships between the federal government and participating provincial and territorial governments and covers nearly 60% of full-time students. Applicants in participating sub-national jurisdictions are assessed for federal and provincial loans and grants through a single application process (Employment and social development Canada, 2021[27]).

Policy recommendations

Key finding:

Despite a solid foundation of direct and indirect financial supports, students can still experience credit constraints when it comes to paying for living costs while studying, raising barriers for widening access, achieving a good student-to-programme match, and supporting completion rates, particularly for mobile students.

Recommendations:

1. Revise the formula for calculating the means-tested grant with the aim of making an explicit contribution to tuition fees and an explicit contribution to living costs and consider the possibility of increasing the generosity of living cost contributions to the lower-income and mobile grant recipients.
2. Explore the possibility of introducing a state-guaranteed living cost loan to students where the state and students jointly contribute to the portion of necessary living costs during studying that are not covered by the grant, ensuring cross-party, long-term commitment and attention to address culturally important concerns related to taking on loans.

4.2.4. Lower-income mobile students could be eligible for extra direct and indirect housing support

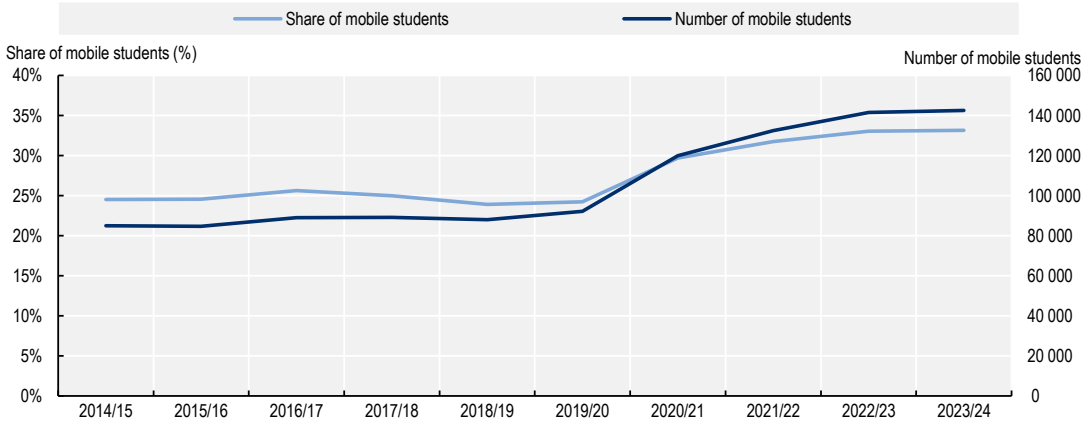
Living costs tend to be higher for students who study in a location away from their parental home and live independently. Such financial constraints risk impacting lower-income students disproportionately since they tend to have fewer financial resources at their disposal to invest in education. Considering opportunities for student mobility is therefore important in order to understand barriers to achieving good student-to-programme matches.

A growth in mobile students puts pressure on the stock of student accommodation

The share of students in Portugal who are registered as mobile ("*deslocados*" or "displaced")[2] has increased in recent years, and significantly between 2019 and 2022 in particular. While the majority of students in Portugal remain living in their parental home while studying, data from Portugal indicate that 33% of students enrolled in all cycles of study (excluding students enrolled in credit mobility programmes, e.g. exchange students) were considered mobile in 2023, up from 25% in 2014 (Figure 4.5). The increase in student mobility poses challenges for local housing markets.

Figure 4.5. The share of students who are mobile has grown in the past decade

Share and number of enrolled students who are registered as mobile ("displaced"), Portugal, 2014-2023



Note: Data includes students enrolled in all cycles of study in public and private institutions and excludes students enrolled in credit mobility programmes (i.e. exchange students). Mobile students are defined as students registered as 'displaced' by their higher education institution.
Source: DGEEC, Survey on the Registration of Enrolled and Graduated Higher Education Students (RAIDES), 2013-2023.

The provision of subsidised student housing tends to be the favoured solution to provide student housing in Portugal, particularly as support for lower-income mobile students. Subsidised student housing is provided and managed by social support services in higher education institutions, which also undertake the selection process if subsidised student housing is oversubscribed. In oversubscribed accommodation, grant recipients are granted preference over students who do not qualify for the grant.

A recent evaluation in Portugal found that there is some disparity between student demand and the supply of subsidised student housing. The overall number of mobile students most exceeded the number of available student rooms was in Lisbon, Porto and Coimbra, as well as at the polytechnic institute of Cávado and Ave in the Braga district (MCTES, 2022[28]). The extensive private provision in Lisbon, Porto and Coimbra provides additional indication that there is outstanding demand for student accommodation in these areas (PNAES, 2024[29]).

4.2.5. Portugal has made important improvements in the support to mobile students, but some challenges remain

Portugal has undertaken large-scale investment in the stock of student accommodation

With the aim that at least all students receiving grants can be offered subsidised accommodation on request, the government launched a large-scale student housing investment plan, the national accommodation plan for higher education (*Plano Nacional para o Alojamento no Ensino Superior*, PNAES) in 2018. PNAES looks to provide an integrated and long-term response to the increasing need for affordable student accommodation (Diário da República, 2018[30]; Diário da República, 2019[31]) (see Box 4.4).

Box 4.4. Renewed political commitment to increase the stock of student housing

Under the *Contrato de Legislatura* for 2020-23, the Government in Portugal agreed to invest in the National Housing Plan for Higher Education (*Plano Nacional para o Alojamento no Ensino Superior*, PNAES) to increase the number of beds in subsidised student housing. The government has invested a total of EUR 516 million, EUR 447 million of which is financed by the EU-funded Recovery and Resilience Plan, where EUR 375 million is a loan and EUR 72 million an additional grant.

Financing is allocated to eligible institutions as a grant and has been provided to public bodies with an important role in science and higher education, such as local authorities, higher education institutions and other eligible entities with recognised activity in social, real estate and hospitality fields.

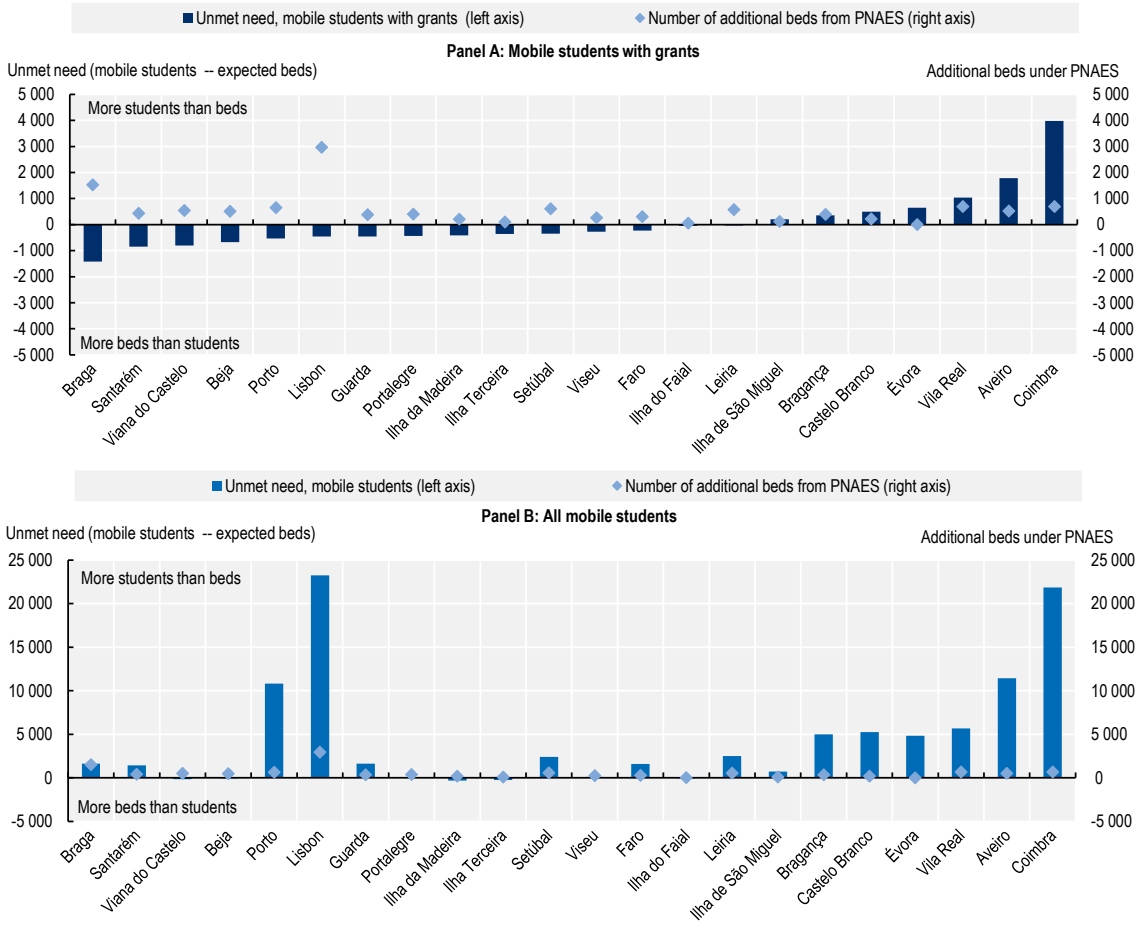
With the target of raising the number of rooms in subsidised student accommodation available at regulated prices to 30 000 by 2030, involving 18 000 beds by the first quarter of 2026, PNAES is the largest investment ever in student housing in Portugal. Most of the planned new beds are located in Lisbon (2 964), Braga (1 524) and Coimbra (695). The smallest number of beds will be constructed in Castelo Branco, the island regions, Guarda, and Évora.

Source: OECD (2022[32]); PNAES (2023[33]); Eurydice (2023[34]); and bespoke tables from PNAES, 2025.

The ability of PNAES to address the unmet demand for student housing will depend on the extent to which it can prioritise additions to the housing stock in areas with the greatest need. Figure 4.6 estimates the level of unmet need, defined as the number of expected beds after PNAES minus the number of mobile students in 2023/24, across districts in Portugal. Panel A considers the unmet need when taking into account only the number of mobile students who also receive means-tested study grants from the government, while Panel B considers all mobile students. Panel A indicates that even with the new beds expected under PNAES, there will likely remain considerable unmet need even when considering only grant recipients, including in Coimbra, Aveiro and Vila Real. In other districts, the need among grant recipients is expected to be met, while there will likely remain considerable unmet needs among students who are not eligible for the means-tested study grant, including notably in Lisbon and Coimbra (Figure 4.6).

Figure 4.6. There will likely remain some unmet need among mobile grant recipients in certain locations even after PNAES

Estimate unmet need based on the number of expected beds under PNAES by 2030 subtracted from the number of mobile students with grants (Panel A) and the number of all mobile students (Panel B) in 2023/24, public sector, by district



Note: Data include students enrolled in all cycles of study in public institutions but exclude students in credit transfer programmes (i.e. exchange students). Data for available residencies in 2017 only include public institutions. Institutional data from RAIDES tend to report fewer grant recipients than DGES national aggregates, which means that the chart may be underestimating the unmet need for grant recipients. Where the number of reported mobile grant recipients is lower than 3 in 2022/23, data refer to the second-latest reported numbers. This means that instead of 2023/24, data on enrolled grant recipients refer to 2022/23 for Beja and Bragança, and to 2016/17 for Guarda.
Source: DGES (2017) Inquérito DGES para Programa Nacional de Alojamento Académico, accessible in PNAES (2023[33]); bespoke tables, PNAES; DGEEC (2023[35]), RAIDES.

Given the expected level of unmet need remaining after PNAES, it cannot be assumed that purpose-built state-subsidised student accommodation can sufficiently meet needs in the short term. Going forward, the Ministry could therefore consider further ways to continue to improve the accessibility of affordable student housing through targeted investment and collaborations with regulated private providers.

It will be important to evaluate the adequacy of the provision and allocation of subsidised student housing across institutions independently to ensure that the existing stock of housing is fit for purpose and that the allocation process is effective in supporting mobile students immediately on arrival in their first year. It will also be crucial to evaluate the actual level of unmet need for student housing (for lower-income and higher-income students) after the completion of PNAES and ensure that future publicly funded investments in

student housing contribute proportionately to locations with the greatest outstanding need. If it is possible for the Ministry to secure more funding for student housing in the long term, the allocation of funding should aim to provide housing in the locations with the greatest current and expected unmet need. An example of a country with a long-standing commitment to maintaining a large stock of student housing can be seen in the well-established network of student housing in Finland (Nordic Co-operation[36]; SOA Association[37]) (Box 4.5).

In the medium term, it is likely that there will still be a shortage of student accommodation. It is therefore crucial to acknowledge that students must engage with the private rented market. It is a good first step that the PNAES includes a project to map the private (and public) student accommodation available on the market and prices across different geographical locations in Portugal, through the Observatory for Student Housing, Alfredo, (although this system likely excludes the undeclared private rental market).

The Ministry could complement its necessarily long-term work on the provision of new subsidised institution-managed student housing by engaging with the private and non-profit sector. The Ministry could work across government, higher education institutions, and municipalities to encourage collaborations with private for-profit and non-profit providers of purpose-built accommodation, possibly drawing on the experience in Vienna, Austria (Franz and Gruber, 2022[38]) (Box 4.5). Acknowledging that private for-purpose student housing risks pushing up market prices, the government could consider approaches to regulate private providers in ways to keep student rents at least slightly below market rents.

Box 4.5. Student housing provision in Finland and Austria

In **Finland, non-profit student housing organisations** are either owned by foundations, municipalities, student unions or associations. The student housing organisations that operate under the co-ordination of the Finnish Association of Student Housing Organisations (SOA) are present in the major university cities and together own over 45 000 (mostly) state-subsidised rental apartments. Student selection criteria to access the apartments can vary, but in general full-time students whose studies lead to a degree can apply for housing. Students have access to rooms in shared apartments, studios intended for one student and family apartments intended for couples or students with children. Studios are in high demand and can require students to join a wait list (Nordic Co-operation[36]; SOA Association[37]). Students who are entitled to student financial support and live in the institutions' accommodation receive a student financial housing supplement, while students who live outside institutions' accommodation (and not with their parents) receive the general housing allowance via the social insurance institution Kela (Nordic Co-operation[36]).

For-profit student housing providers started operating in the Viennese student housing market, in Austria, from 2010 onwards as a complement to, rather than a replacement for, not-for-profit housing. Student housing providers in Vienna operate within a long tradition of social housing provision and non-profit providers have traditionally received public funding for construction and maintenance costs. For-profit developers complement non-profit providers and cater to a student population with greater spending power and have provided most of the new-build student accommodation in the city since 2015. The increases in for-profit housing providers have occurred in parallel with smaller increases in non-profit accommodation. Non-profit providers report that the observed demand for housing seems to have been met to a greater extent, and that they have therefore focused on quality upgrades rather than on increasing the stock. An inventory of student accommodation shows that out of the 130 accommodation facilities, the majority are still run on a non-profit basis to provide housing to students who need lower-cost housing options (Franz and Gruber, 2022[38]).

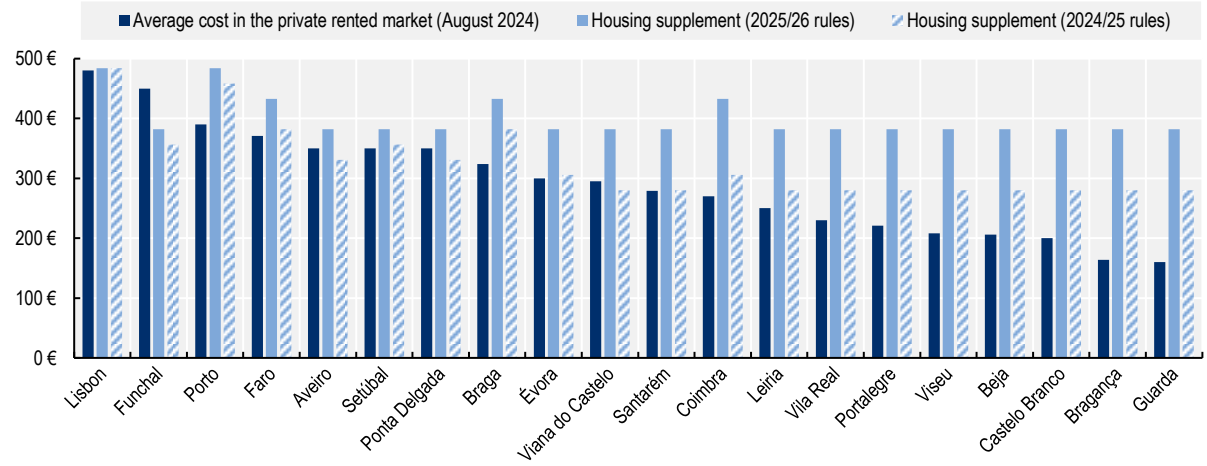
The housing supplement aims to financially support lower-income students who are not able to access a place in subsidised student housing

The government has acknowledged that some students may not be able to secure a place in subsidised student housing and have made special provisions for mobile students with lower family incomes. Mobile students who fulfil the criteria of being "displaced" and who receive the state-funded study grant can be eligible for a housing supplement if they have applied to, but been denied, a place in subsidised student housing. The housing supplement is a monthly contribution to private rented accommodation, equal to the rental cost actually paid for the accommodation up to limits set for each municipality and is provided during the academic period in which the state grant is awarded. In 2024 it was expanded at 50% of the full supplement for non-eligible students with income per capita between 23 and 28 IAS (Diário da República, 2024[21]). Subsequently, in 2025, a law (which has not yet been regulated) was passed by the Assembly of the Republic (Assembleia da República) determining that the eligibility criteria are to be expanded to include mobile students with an annual family income up to and including the sixth income tax bracket (Diário da República, 2025[39]).[3]

The law passed by the Assembly of the Republic determines that the level of the housing supplement is to be increased substantially across many municipalities in 2025 (Diário da República, 2025[39]). While this law has not yet been regulated, the announced increase would occur on top of previous increases (beyond annual adjustments) by the ministry responsible for higher education in October 2023 and December 2022 (Diário da República, 2023[40]; Diário da República, 2022[41]). The increase in October 2023 had already brought the supplement roughly in line with average housing costs in each geographical district. The planned increases announced in the law from 2025 provide a disproportionately high housing supplement in lower-cost districts. For example, while it seems adequate that the housing supplement is set to 75% of IAS in Setúbal, it appears less aligned with observed costs in Bragança and Guarda (Figure 4.7) (Diário da República, 2025[39]).

Figure 4.7. The housing supplement is significantly higher than observed average private rental costs

Average monthly cost of private rented student accommodation in August 2024 and the maximum expected housing supplement using the 2024/25 and 2025/26 criteria, by district, Portugal



Note: Average monthly costs of private rented student accommodation refer to observed prices in August 2024. To ensure comparability with the data on rental costs, the IAS for 2024 is used to calculate the estimated housing supplements for both 2025/26 and 2024/2025. All prices are in nominal terms. Housing supplements are provided based on the geographical level of the municipality while data on averages prices for private student accommodation are given by district. Where the housing supplements available differ within a district, the figure shows the highest housing supplement available in the district. Some districts therefore include municipalities where the housing supplement is lower than the one shown on the chart.
Source: PNAES (2024[42]), Índice de preços do alojamento estudantil, sumário por cidade 08-2024; Diário da República (2025[39]; 2023[40]).

Such high housing supplements in lower-cost regions would allow students to pay for housing at a price above the district average, which risks pushing up prices in the housing market, particularly as the eligibility criteria for the housing supplement is further expanded.

The recent increases of the housing supplement combined with the expanded eligibility criteria in terms of family income and the administrative difficulties of adequately controlling students' eligibility (discussed in Section 4.3), may also provide an argument for lowering the level of the housing supplement, particularly in low-cost districts. Lowering the level of the supplement would open up the possibility of reallocating some funds to a contribution to living costs for low-income mobile students distributed as a boost to the means-tested study grant for students registered as "displaced", as discussed in the next section.

The Mais Superior programme risks creating adverse incentives

The government offers grants to some students through the "*Mais Superior*" programme, which aim to support higher education enrolment in institutions located in areas of Portugal where there is currently lower student demand. It targets low-income students who move to an area which is experiencing lower student demand to enrol in an institution.

The *Mais Superior* programme started to provide grants specifically targeted at students from lower-income families in 2016/17, and since 2019/20, the value of the grant has been fixed at the nominal value of EUR 1 700 annually. The value of the grant is increased by 15% for students who enrol in short-cycle CTeSPs and students entering through the special competitions for candidates over 23 years (Diário da República, 2021[12]; Diário da República, 2023[13]). The Mais Superior grant is provided to relatively few students but considering that the minimum grant in the mainstream student grant system is set at EUR 871 per year, students in receipt of the Mais Superior grant will receive a considerable boost to their income.

While the purpose of *Mais Superior* is to enhance territorial cohesion by encouraging lower-income students to move to less economically vibrant regions, it risks counteracting the policy aim of promoting equity in education. The comparatively high level at which the grant is set can skew incentives for lower-income students to choose programmes that are not optimal for them. Such geographical targeting is therefore risky and should be implemented with great care. For the purpose of promoting equity in educational opportunities, it could be more effective to introduce a smaller living-cost contribution for all mobile grant recipients (beyond the current contribution to housing costs), unconditional on the study location.

Policy recommendations

Key finding:

Despite large-scale government spending to increase the quality and stock of subsidised student housing, a shortage of student beds will likely remain in certain geographical areas, which raises barriers for widening access, achieving a good student-to-programme match, and supporting completion rates, particularly for mobile students.

Recommendation:

3. Continue to improve the accessibility of affordable student housing through targeted investment and collaborations with regulated private providers.

4.3. The eligibility rules for student grants are complex to operationalise and understand, increasing uncertainty for students

Student financial support systems not only support students during their studies but also play an important signalling role. For the student financial grant system to work well, it is necessary that students (including prospective ones) know which supports they are eligible for and how much support they can expect to receive. This will help students and their families to make informed choices about whether and what to study. It will also help the government to communicate the incentives they have built into the support system, including policy and political aims such as widening access, encouraging talented students to move to selective courses, or promoting territorial cohesion.

Insights from behavioural economics suggest that many observed student behavioural patterns, such as present bias (the tendency to give greater weight to outcomes in the present compared to the future), over-reliance on routine or defaults, and debt aversion, are particularly pronounced among individuals who face complex decisions (Lavecchia, Liu and Oreopoulos, 2016[43]; Scott-Clayton, 2011[44]; Hoxby and Turner, 2015[45]; Hoxby and Turner, 2013[46]; Carrell and Sacerdote, 2017[47]). Similarly, research on welfare applications in the Netherlands show that applicants experiencing longer processing times are more likely to withdraw or fail to complete their applications (Vethaak et al., 2025[48]). Clarity and effectiveness in administrative processes are therefore key in ensuring that targeted support reaches the intended recipients.

4.3.1. The eligibility criteria for support changes in the transition from secondary education to higher education, making predictability challenging

In Portugal, as elsewhere, a complex grant application system with criteria that are difficult to understand and implement effectively can create uncertainty among current and prospective students. This uncertainty can have a negative impact on students' perception of the opportunities available to them, and in the worst case, deter prospective students from applying or enrolling in higher education. This is highlighted by one

respondent to the project survey who reported that lower-income candidates struggle with "the fear of being placed at a university far from home, due to the delay in granting social support, for example, months without receiving a scholarship."

Project stakeholder interviews highlight that social action support teams struggle to appropriately implement the eligibility checks in non-typical but not uncommon cases, including notably for single-parent households, households with independent workers and households with undeclared income. The case management system for such non-typical cases is reportedly slow and resource intensive. Some social support teams report to the project that they need to spend several months on evaluating applications, due to the low number of social assistance personnel relative to the administrative burden and the number of applicants.

At least part of the reported uncertainty around the grant levels arises because the eligibility criteria for the higher education study grant are different from the eligibility criteria for ASE grants in secondary education (which uses the system used for the overall benefit system, including family benefits, "*Abono de família para crianças e jovens*"). Importantly, the formulae for adjusting the annual income to family size are different, meaning that the same annual family income results in different per capita family incomes used to establish the eligibility bracket (see Section 4.2.3 for a detailed discussion on the effects of this).

Some differences also exist between the eligibility criteria for the higher education study grant and the family benefits in the definition of the household, defined in the legal dispatch n. 7253/2024 of 3 July for the study grant and the Decree-law n. 70/2010 for the family benefits. More importantly, however, there are also considerable differences in the definitions of the incomes that should be taken into account for the means test, defined in the legal dispatch 7253/2024 and the decree-law 70/2010 respectively, particularly for income from dependent work (article 35 and article 6, respectively), income from business and professional income (article 36 and article 7, respectively), and capital income (article 37 and article 8, respectively), as highlighted in Table 4.1.

Project stakeholder interviews highlight that social action support teams struggle to appropriately implement the eligibility checks in non-typical but not uncommon cases, including notably for single-parent households, households with independent workers, and households with undeclared income. The case management system for such non-typical cases is reportedly slow and resource intensive. Some social support teams report to the project that they need to spend several months on evaluating applications, due to the low number of social assistance personnel relative to the administrative burden and the number of applicants.

For example, accurately reporting the family situation can be more challenging in non-traditional family constellations, changing situations and multi-generational households. The number of these situations risk growing since increasing housing costs have meant some families have coped by moving in with elderly parents or other relatives. Even though family members may accept to live together in the short term to cope with immediate financial difficulties, this does not necessarily mean that they consider themselves one household that shares large expenses equally. However, it can be difficult for students to prove their experienced situation.

At worst, the difficulties in objectively interpreting the guidance on evaluating student eligibility could mean that some grant-eligible students do not receive the level of support to which they are theoretically entitled. For example, in one stakeholder interview, a member of the social support services staff highlighted an example where two siblings reporting the same information in the same year to different institutions were provided with different grant levels.

Table 4.1. Key differences between the eligibility rules for the study grant at higher education and the social action support at secondary education

	Higher education Legal dispatch n. 7253/2024, 3 July	Secondary education Decree-law n. 70/2010
Income from dependent work (article 35; article 6)		Excludes income from seasonal jobs undertaken by young people (subsection v of section i of chapter ii of the Code of Contributory Regimes of the Social Security System).
Business and professional income (article 36; article 7)	Income defined in article 3 of the Personal Income Tax Code (CIRS), with special rules for income based on the organised accounting regime.	Income defined by applying § 1-3 of article 162 of the Code of Contributory Regimes of the Social Security System.
Capital income (article 37; article 8)	Addition of income from shares in limited companies, including provisions when there is no distribution, in definition.	Deposits in bank accounts and other securities may be defined as income in some cases.
Property income (article 38; article 9)	Special provisions for the primary residence if the asset value is higher.	Special provisions for the primary residence if the asset value is lower.
Pensions (article 39; article 10)		
Social benefits (article 40; article 11)	Income from higher education grants are included in definition.	
Housing support on a regular basis (article 41; article 12)		The value is determined in a staggered manner.
Training grants (article 42; article 13)	Training grants are included in the definition.	

Source: Diário da República (2010[49]; 2024[21]).

It is promising that the Ministry is working on an improved information system for the Directorate-General of Higher Education (Direção-Geral do Ensino Superior, DGES) in the near term and has committed to changing the procedures set out in the Regulation for the Allocation of Scholarships to Higher Education Students (Regulamento de Atribuição de Bolsas de Estudo a Estudantes do Ensino Superior, RABEES) with the aim of ensuring that decisions on applications for scholarships, conditional on enrolment, will be known before the results of the national competition for access to higher education are published (Diário da Rebública, 2025[50]).

However, given that the final decision is currently based on the interoperability between DGES, the tax authorities and the social security system, which is reportedly only possible after September, it should be made clear to students that the decision is preliminary and pending a final eligibility check by the social support services in higher education institutions (Diário da Rebública, 2025[50]). A short-term policy option would be to abandon this pay back provision. In such a situation, students would not be liable to pay back overpayment in cases they are found after initial checks eligible for a lower (or no grant) compared to the predicted decision. Grant payments received after the final assessment is made would simply be adjusted downward.

To help provide further predictability for students and their families, the Ministry and DGES could investigate the possibility of aligning their formula for calculating family income adjusted for household size and eligibility criteria with the family benefit income brackets (“escalões”) and consider whether there could be closer collaboration between the higher education sector and the competent body in the social security system on assessing students’ eligibility in future.

4.3.2. The complexity of operationalising the eligibility controls of the lowest-income students means that case management is overly slow and resource intensive

It is particularly important to limit waiting times for those in most need of the study grant, which in the means-tested system in Portugal is deemed to be the lowest-income students. It is therefore promising that a recently implemented system of automatic allocation of grants for some students has helped address the long waiting times for some of the students with the lowest family incomes.

From 2020/21, students who had received a grant in the previous year and who had not experienced significant changes in their household income, were provided with the same grant amount in the following academic year (DGES, 2024[51]). Additionally, from the 2022/23 academic year, students who received school social action (*Ação Social Escolar*) in brackets A, B, or C in secondary education and who entered higher education through the National Access Competition automatically started receiving the means-tested study grant (MCTES, 2024[52]; DGES, 2024[51]). Participants in project focus groups reported that the automatic allocation of grants was considered to have had a positive impact on student decisions, as it provides students with immediate support upon enrolment.

However, not all students who received the study grant advance based on the preliminary decision are eligible to receive their predicted grant level. When the final eligibility checks are completed by the higher education institutions, the decision can therefore be corrected. In these cases, students are requested to repay the grant they had already received in surplus of that for which they are eligible. Project interviews with stakeholders in social support teams in higher education institutions highlight that completing the eligibility checks can be challenging in some cases, prolonging the process several months. Stakeholders also explain that the eligibility checks for students receiving an advance are completed last – since these cases are deemed to be less urgent when students are already receiving some grant. However, this system means that students can incur large sums for repayment if they are found to be ineligible or eligible for a lower support level than initially estimated.

Eligibility checks are particularly liable to be prolonged, thereby making receipt uncertain, in cases with the lowest-income students. The social support teams are obliged to interview the applicant in order to ascertain the veracity of the declared income and the family situation, whenever the annual family per capita income is less than six times the IAS (EUR 3 056 in 2024). For a stylised case of a family of two parents and two children living independently in a household, this cut-off family per capita income for an interview translates into an annual family income of EUR 12 222 per year (see dotted blue line in Figure 4.8). This compares with the annual national minimum wage (for a single person) of EUR 11 480 in 2024 (Diário da República, 2023[53]).

As mentioned in the previous section, the formulae for adjusting the annual income to family size are also different between the study grant at higher education and the social action support at secondary education. For the higher education grant, the “per capita family income” is the value resulting from dividing the annual household income by the number of people comprising it. For the family benefits, the “reference income” is the result of dividing annual household income by the number of children and young people entitled to family allowance, plus one. This means that the same annual family income result in different per capita family incomes used to establish the eligibility bracket.

Figure 4.8 shows a stylised example to illustrate the impact of the differences in the calculation to adjust for family size with a given family income and a given family size. In the stylised example of a family with two parents and two children living independently, an annual unadjusted family income of EUR 12 000 would be calculated as a per capita income of 3 000 (four family members) for the higher education study grant. Meanwhile, the same income would be adjusted to the reference income of EUR 4 000 (two dependents plus one) for ASE in secondary education.

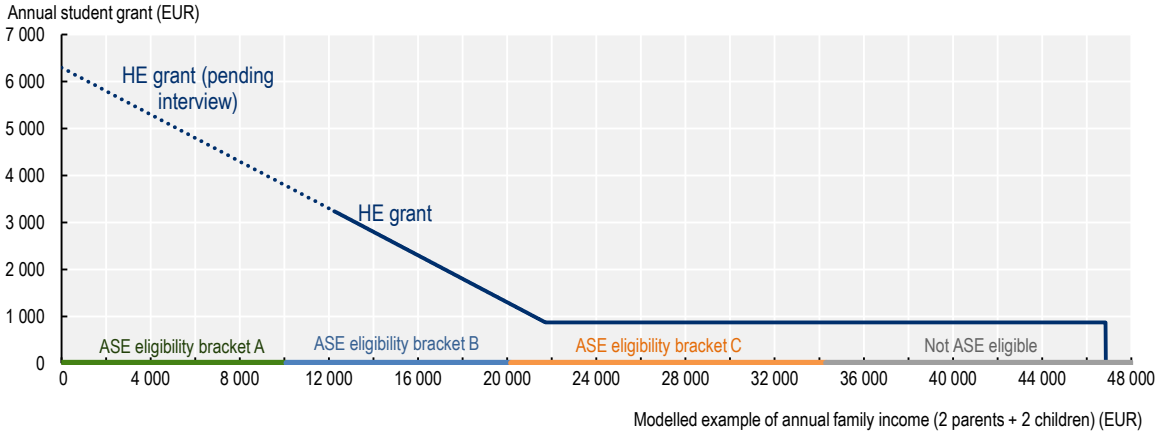
In the higher education grant system, this means that the per capita family income is less than 6 IAS and the student will be requested to attend an interview to prove their income and family situation. By comparison,

for the secondary education ASE, the adjusted family income is nearly 8 IAS, which places the family in ASE bracket B. Figure 4.8 illustrates the higher education study grant levels in the chart and the ASE eligibility along the horizontal axis.

In the shorter term, there might therefore be a case to relax the conditions that necessitate an interview. These systemically result in longer decision periods and uncertain levels of receipt for the lowest-income students and run counter to policy to widen access. In the medium term, the government could revise the eligibility criteria for the means-tested grant with the aim of ensuring that the grant system is implementable in a predictable, fair, and effective manner.

Figure 4.8. For a family of two parents and two children, students who received ASE A in secondary education might need to attend an interview before receiving the higher education study grant

Expected value of the annual student grant for Portuguese students and School Social Action eligibility for a modelled example of a family with two parents and two children, 2024



Note: The modelled annual family income is calculated as the annual family per capita income multiplied by four (two parents and two children). The chart includes a dotted line up until a family income of six times the IAS to indicate that there are further investigations in situations where family incomes per capita are registered at or below 6 times IAS in 2024. The model assumes that the maximum legal tuition fee is paid and that all conditions other than family income are fulfilled for eligibility to the higher education study grant, including, but not limited to, conditions related to citizenship, movable assets, course choice, and credits completed. It also assumes that the family lives independently of other family members. The reference higher education student grant is calculated as 11 times the IAS plus the maximum legal tuition fee in 2024. The maximum family income is calculated as the IAS multiplied by 23 times in 2024. The income bounds for ASE uses IAS values in 2023, in accordance with eligibility rules for 2024. The model does not include any supplements.
Source: DGAEP (2023[19]); OECD (2025[6]); Diário da República (2012[20]); Diário da República (2024[54]); and Caixa Geral de Depósitos (2025[55]).

4.3.3. The design of the housing supplement rightly attempts to curb informality in the private rented sector, but risks placing the burden of control on vulnerable students

With regard to the housing supplement, project interviews with stakeholders highlighted the difficulties students have in proving their eligibility. Stakeholders report that students looking for housing in private rented accommodation often must rely on informal arrangements without contracts and with rent payments in cash. This poses a problem to students applying for the housing supplement, since they need to provide monthly receipts as proof of payment (Diário da República, 2024[21]). A law from the Assembly of the Republic passed in 2025 but not yet regulated determines that these rules will be slightly relaxed as students will be able to prove payment by showing a bank transfer (Diário da República, 2025[39]). However, a problem will remain where students are required to pay for their housing with cash.

It is clear that the government would like to address the larger issue a widespread informality in the private rented sector. This issue is likely to affect student housing as well as other forms of private rentals, including short-term tourist rentals and longer-term private rented housing. Students – like other renters – would benefit from the protections afforded by a formalised housing market, and the Ministry could consider collaborating across government and with the tax authorities to implement broad actions to help regularise the market and identify questionable landlords.

Meanwhile, the Ministry is tasked with the difficult challenge of supporting students facing a housing market with a reportedly high degree of informality. It is important to discourage the irregular housing market, but it is a tall order to place the responsibility for regularising rental contracts on individual low-income students. Low-income students are not only competing for housing with high-income students but also with the tourist sector and other short-term rentals, meaning that the bargaining power of low-income students with private landlords is generally low.

Moreover, the monthly housing supplement is conditional on providing a rental contract or supplying a monthly application and eligibility check occurring after the rental payment (Diário da República, 2024[21]). This procedure risks making the payment of the supplement untimely and may mean that low-income students prefer the certainty of a lower-cost informal agreement to a higher-cost formal agreement with the risk of being reimbursed late (or not at all) via the housing supplement.

It would be concerning if the vulnerability of low-income students – due to their low bargaining power and overall credit constraints – itself induced them to accept the lowest-cost rentals without formal agreements or receipts. This may mean that the housing supplement, by design, risks failing to reach the lowest-income students who should be its primary target group. Such challenges in targeting are particularly pertinent given the substantial additional resources recently allocated to the housing supplement system to increase its level and expand eligibility in terms of family income. The government could therefore consider revising the eligibility criteria for the housing supplement with the aim of ensuring that the system is implementable in a predictable, fair, and effective manner.

In an ideal world, students would have an official rental contract and monthly payment receipts to show as proof of their rental status. However, given the vulnerability of low-income students in the rental market, it may be reasonable to show greater flexibility in accepting informal documentation. The verification of rental status through more informal documentation could occur under conditions with a similar level of flexibility as those in Article 44 in the Order defining the conditions for granting the means-tested study grant, namely that: “income subject to withholding taxes and income from work not declared for IRS purposes may be considered as income, subject to the student's commitment of honour or upon presentation of a supporting document” (Diário da República, 2024[21]).

Policy recommendations

Key finding:

Complexities in the eligibility criteria for the study grant and accommodation supplement introduce unpredictability regarding grant receipt and result in prolonged eligibility checks, which pose barriers for widening access and achieving a good student-to-programme match, particularly for mobile students.

Recommendations:

4. Revise the eligibility criteria for the means-tested grant with the aim of ensuring that the grant system is implementable in a predictable, fair and effective manner.
5. Revise the eligibility criteria for the housing supplement with the aim of ensuring that the system is implementable in a predictable, fair and effective manner.

4.4. The level of indirect financial support delivered through social support services varies across regions, cities and higher education institutions

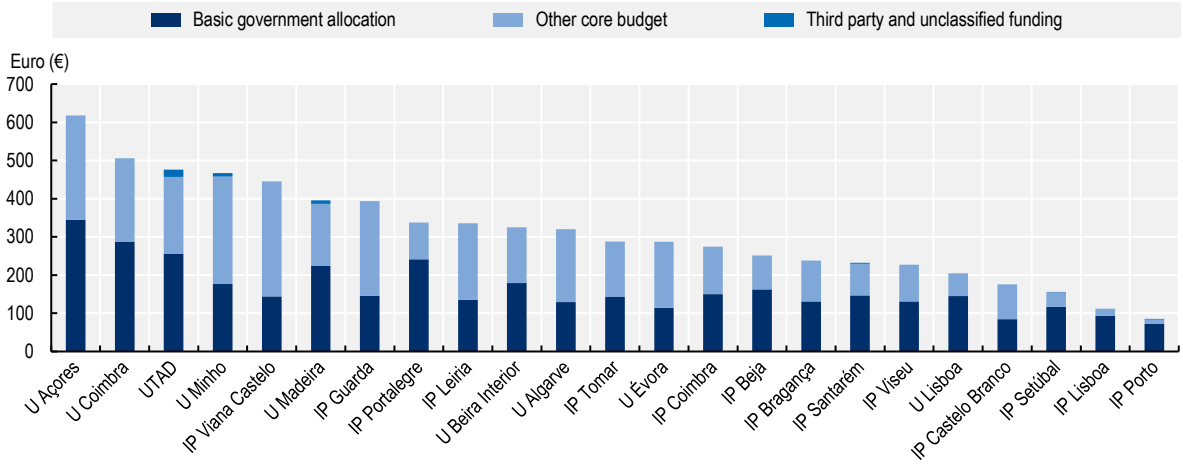
It is valuable that students in Portugal have access to a range of indirect student support services, including subsidised canteens and student housing, as well as non-financial student support programmes. Higher education institutions are responsible for organising and funding these services. To do so, institutions depend heavily on public funding through the institutions' core budgets. Social support services also receive complementary funding from DGES that contributes to the provision of indirect financial support for students, including subsidised canteens and student housing, according to the number of meals served and beds occupied in student housing by grant holders.

Social support teams in higher education institutions can also supplement their internal budgets with income from various sources, including revenues from their own provision of services within the scope of social support; tuition fee payments; proceeds from fees, emoluments and fines (Diário da República, 1993[56]). Social support teams also retain some autonomy in the types of services they provide. While all social support services manage certain core services such as student housing and subsidised canteens, some teams also provide some health care services, including mental health support, mentoring and tutoring programmes, as well as other forms of support. Such flexibilities can help social support teams provide services and support but could also contribute to variations between higher education institutions in the availability and type of support measures (OECD, 2022[32]).

As previous OECD analysis on the resourcing of the higher education system in Portugal has discussed in detail, core-funding allocations to individual institutions had become progressively misaligned with real enrolment levels. In the years after the 2008-09 financial crisis, core-funding allocations to institutions were decoupled from enrolment levels. While the government did significantly reduce public funding to institutions after the financial crisis, it has since increased investment in the sector. Core funding from the state budget for public institutions increased by 15% in nominal terms between 2017 and 2021 (OECD, 2022[32]). However, the decision not to apply a formula-based allocation process between 2009 and 2023 contributed to considerable differences in the funding for Social Action Services per enrolled student (Figure 4.9).

Figure 4.9. Funding for social services differ widely between institutions

Funding for "Social Action Services" in higher education institutions from the State Budget and other sources per enrolled student, public universities and public polytechnic institutes, by budget type, 2023



Note: In the figure, U refers to "*Universidade*" or "University" and IP refers to "*Instituto Politécnico*" or Polytechnic Institute". UTAD refers to Universidade de Trás-os-Montes e Alto Douro. Funding is for the financial year 2023 and student numbers are for the academic year 2023/24. Disaggregated data on the budgets allocated to Social Action Services are not available for public institutions with foundation status (one public polytechnic institute (IPCA) and four public universities (Aveiro, ISCTE, Nova and Porto)).
Source: Bespoke tables by DGES; DGEEC (2023[35]), RAIDES.

It is positive that a new higher education financing model was applied in 2023/24 (Diário da República, 2024[57]), integrating many of the recommendations from the OECD report Resourcing Higher Education in Portugal (OECD, 2022[32]) and providing a strong foundation for the sector to adapt to changing demographic conditions. However, under the previous funding model, institutions that did not have foundation status, had a separate budget line for the funding allocation to Social Action Services, but that is not the case in the new formula. Instead, the funding is allocated to institutions as a whole and each institution decides how much to give to social support services.

There is some oversight to make sure that institutions provide a minimum level of relevant core services. Within institutions, the Social Welfare Council manages the system of social support. This is the advisory body responsible for the management of social action within the scope of each higher education institution. It is responsible for defining and guiding the support to be granted to students (Diário da República, 1993[56]). Outside of institutions, the Higher Education Coordinating Council is a co-ordinating body made up of national and international experts which advises institutions on a wide range of issues, including social action programmes (Diário da República, 2023[58]).

There will remain a need to monitor funding for social support services. The Ministry could commission an analysis of the factors that explain variations in the per-student levels of investment in student social action services between public higher education institutions and consider the case for minimum levels of provision, or adjustments in the implemented formula.

For example, assigning greater weight in the per-student funding to students from under-represented population groups can align funding with the costs institutions face in providing social services and suppress the possible temptation for institutions to reduce or restrict their intake of under-represented groups for financial reasons (Dougherty et al., 2014[59]). Perhaps the Ministry could draw inspiration from Ireland, which provides a boost in the per-student funding for students from equity target groups or the needs-based funding system in Australia (Salmi and D'Addio, 2021[60]; Australian Department of Education, 2024[61]) (Box 4.6).

Box 4.6. Institutional funding based on the socio-economic profile of students in Ireland and Australia

Ireland provides a boost in the per-student funding to institutions for students from equity target groups. The funding formula for institutions in Ireland allocates a block grant to higher education institutions on the basis of enrolment numbers and cost of disciplines, while also providing a 30% premium for each student that institutions enrol and who belong to any of the priority equity target groups defined by government (students from low socio-economic background, ethnic- or cultural-minority background, or with disability) (Salmi and D'Addio, 2021[60]; OECD, 2022[62]).

The **Australian government has committed to implementing a new needs-based funding system** as a core component of funding for higher education teaching and learning. As recommended in the Australian Universities Accord (Recommendation 13). Needs-based Funding will provide per-student funding for students from historically under-represented backgrounds (students from low socio-economic status, areas and First Nations students), and students studying at regional and remote campuses recognising the higher cost of delivery in these areas. The proposed Australian Tertiary Education Commission (ATEC) will have a role as the system steward to implement needs-based funding (Australian Department of Education, 2024[61]).

Policy recommendations

Key finding:

Variations in the funding that institutions allocate to social student support services from their budgets can contribute to differences in the quality of these services across institutions, which can limit their impact on reducing barriers to support student success.

Recommendation:

6. Commission an analysis of the factors that explain variations in the per-student levels of investment in student social action services between public higher education institutions.

References

Australian Department of Education (2024), *Australian Universities Accord Final Report*, Australian Department of Education, https://www.education.gov.au/australian-universities-accord/resources/final-report. [61]

Caixa Geral de Depósitos (2025), *Abono de família: 12 perguntas e respostas sobre como funciona*, https://www.cgd.pt/Site/Saldo-Positivo/protecao/Pages/abono-de-familia.aspx. [55]

Caixa Geral de Depósitos (2023), *Ação social escolar: o que é e como solicitar?*, https://www.cgd.pt/Site/Saldo-Positivo/protecao/Pages/acao-social-escolar.aspx. [14]

Carrell, S. and B. Sacerdote (2017), "Why Do College-Going Interventions Work?", *American Economic Journal: Applied Economics*, Vol. 9/3, https://doi.org/10.1257/app.20150530. [47]

DGAEP (2023), *Valores do IAS*, DGAEP, https://www.dgaep.gov.pt/index.cfm?OBJID=3E74CF19-DA87-4B8F-81E2-51E0649AAA9F. [19]

DGEEC (2023), *Inscritos 2023-2024 Inquérito ao Registo de Alunos Inscritos e Diplomados do Ensino Superior*, Direção-Geral de Estatísticas da Educação e Ciência, https://www.dgeec.medu.pt/art/ensino-superior/bases-de-dados/todas/652ff89abd5c2b00958292d7#artigo-657182903c4f90613cb1b74d. [35]

DGES (2024), *O Ensino Superior em Portugal 2021-2023*, DGES, https://wwwcdn.dges.gov.pt/sites/default/files/o_ensino_superior_em_portugal_2021-2023_documento_final_172024.pdf. [51]

DGES (2024), *Propinas*, https://www.dges.gov.pt/pt/pagina/propinas. [5]

Diário da Rebública (2025), *Orçamento do Estado para 2025: Lei n.º 45-A/2024*, https://diariodarepublica.pt/dr/legislacao-consolidada/lei/2024-902119318. [50]

Diário da República (2025), *Lei n.º 8/2025, de 5 de fevereiro*, https://diariodarepublica.pt/dr/detalhe/lei/8-2025-906173693. [39]

Diário da República (2024), *Despacho n.º 7253/2024, de 3 de julho*, https://diariodarepublica.pt/dr/detalhe/despacho/7253-2024-870653197. [21]

Diário da República (2024), *Portaria n.º 101/2024/1, de 13 de março*, https://diariodarepublica.pt/dr/detalhe/portaria/101-2024-855215460. [57]

Diário da República (2023), *Decreto-Lei n.º 107/2023, de 17 de novembro*, https://diariodarepublica.pt/dr/detalhe/decreto-lei/107-2023-224427489. [53]

Diário da República (2023), *Despacho n.º 10793/2023, de 24 de outubro*, https://diariodarepublica.pt/dr/detalhe/despacho/10793-2023-223200342. [40]

Diário da República (2023), *Despacho n.º 11672/2023, de 17 de novembro*, https://diariodarepublica.pt/dr/detalhe/despacho/11672-2023-224427123. [58]

Diário da República (2023), *Despacho n.º 7646/2023, de 24 de julho*, https://diariodarepublica.pt/dr/detalhe/despacho/7646-2023-216008556. [13]

Diário da República (2023), *Order no. 7647/2023, de 24 julho*, https://diariodarepublica.pt/dr/detalhe/despacho/7647-2023-216008557. [11]

Diário da República (2022), *Despacho n.º 14162/2022, de 9 de dezembro*, https://diariodarepublica.pt/dr/detalhe/despacho/14162-2022-204502007. [41]

Diário da República (2021), *Despacho n.º 11740-A/2021, de 26 de novembro*, https://diariodarepublica.pt/dr/detalhe/despacho/11740-a-2021-174969186. [12]

Diário da República (2019), *Decreto-Lei n.º 30/2019, de 26 de fevereiro*, https://diariodarepublica.pt/dr/detalhe/decreto-lei/30-2019-120272925. [31]

Diário da República (2018), *Lei n.º 36/2018, de 24 de julho*, https://diariodarepublica.pt/dr/detalhe/lei/36-2018-115764791. [30]

Diário da República (2010), *Decreto-Lei n.º 70/2010*, https://diariodarepublica.pt/dr/legislacao-consolidada/decreto-lei/2010-34478775. [49]

Diário da República (2009), *Decree-Law No. 55/2009, de 2 março*, https://diariodarepublica.pt/dr/detalhe/decreto-lei/55-2009-604644. [10]

Diário da República (2003), *Decree-Law No. 176/2003, de 2 agosto*, https://diariodarepublica.pt/dr/detalhe/decreto-lei/176-2003-652702. [9]

Diário da República (1993), *Decreto-Lei n.º 129/93, de 22 de abril*, https://diariodarepublica.pt/dr/detalhe/decreto-lei/129-1993-692654. [56]

Diário da república (2024), *Despacho n.º 9425/2024, de 19 de agosto*, https://diariodarepublica.pt/dr/detalhe/despacho/9425-2024-884568056. [54]

Diário da república (2012), *Despacho n.º 8442-A/2012, de 22 de junho*, https://diariodarepublica.pt/dr/detalhe/despacho/8442-a-2012-3058633. [20]

Dougherty, K. et al. (2014), "Performance Funding for Higher Education: Forms, Origins, Impacts, and Futures", *The ANNALS of the American Academy of Political and Social Science*, Vol. 665/1, pp. 163-184, https://doi.org/10.1177/0002716214541042. [59]

Economia e Finanças (2018), *Propina máxima da faculdade passa para dois IAS*, https://economiafinancas.com/2018/propina-maxima-da-faculdade-passa-para-dois-ias/. [7]

Employment and social development Canada (2021), *Evaluation of the Canada Student Loans Program: Final Report*, https://www.canada.ca/en/employment-social-development/corporate/reports/evaluations/2021-student-loans-evaluation.html. [27]

ePortugal (2024), *Having a child: Financial support and tax deductions*, https://eportugal.gov.pt/en/guias/ter-uma-crianca/apoios-financeiros-e-deducoes-nos-impostos. [15]

Eurydice (2023), *Portugal: National Plan for Housing in Higher Education (PNAES)*, https://eurydice.eacea.ec.europa.eu/news/portugal-national-plan-housing-higher-education-pnaes. [34]

Eurydice (2022), *National Student Fee and Support Systems in European Higher Education*, Eurydice, https://eurydice.eacea.ec.europa.eu/data-and-visuals/national-student-fees. [2]

Fack, G. and J. Grenet (2015), “Improving College Access and Success for Low-Income Students: Evidence from a Large Need-Based Grant Program”, *American Economic Journal: Applied Economics*, Vol. 7/2, pp. 1-34, https://doi.org/10.1257/APP.20130423. [22]

Franz, Y. and E. Gruber (2022), “The Changing Role of Student Housing as Social Infrastructure”, *Urban Planning*, Vol. 7/4, pp. 457-469, https://doi.org/10.17645/up.v7i4.5661. [38]

Government of France (n.d.), *Étudiant*, https://www.etudiant.gouv.fr/fr/bourse-sur-criteres-sociaux-quels-montants-2986. [24]

Guthmuller, S. and E. Meroni (2022), *Evaluation of the higher education grant system for less privileged students in Portugal*, JRC Technical Report, https://portugal2020.pt/wp-content/uploads/JRC128577_01.pdf. [17]

Hanushek, E., S. Machin and L. Woessmann (eds.) (2016), *Chapter 1 - Behavioral Economics of Education: Progress and Possibilities*, Elsevier, https://doi.org/10.1016/B978-0-444-63459-7.00001-4. [43]

Herbaut, E. and K. Geven (2020), “What works to reduce inequalities in higher education? A systematic review of the (quasi-)experimental literature on outreach and financial aid”, *Research in Social Stratification and Mobility*, Vol. 65, https://doi.org/10.1016/J.RSSM.2019.100442. [18]

Hoxby, C. and S. Turner (2015), “What High-Achieving Low-Income Students Know About College”, *American Economic Review: Papers & Proceedings*, Vol. 105/5, https://doi.org/10.1257/aer.p20151027. [45]

Hoxby, C. and S. Turner (2013), “Expanding College Opportunities for High-Achieving, Low-Income Students”, *Stanford SIEPR Working Paper*, https://siepr.stanford.edu/publications/working-paper/expanding-college-opportunities-high-achieving-low-income-students. [46]

IGeFE (2018), *Contrato de concessão de dotação financeira relativo à “linha de crédito para estudantes do ensino superior com garantia mútu” ano letivo de 2018-2019 e seguintes*, IGeFE, https://www.igefe.mec.pt/Files/DownloadDocument/110. [16]

Kela (n.d.), *Student loan*, https://www.kela.fi/financial-aid-for-students-student-loan. [26]

Lourenço, D. et al. (2020), “Enrolling in Higher Education: The Impact of Regional Mobility and Public-Private Substitution Effects”, *Journal of Economic Issues*, https://doi.org/10.1080/00213624.2020.1720574. [8]

MCTES (2024), *Revisão do Sistema de Acesso ao Ensino Superior - 2022/2023*, Ministério da Ciência, Tecnologia e Ensino Superior, https://www.dges.gov.pt/pt/noticia/revisao-do-sistema-de-acesso-ao-ensino-superior-2022-2023-marco-2024. [52]

MCTES (2022), *Plano Nacional para o Alojamento no Ensino Superio (National Plan for Housing in Higher Education)*, MCTES, https://pnaes.pt. [28]

Morgado, R. (2018), *Sobre o valor das propinas*, https://www.dn.pt/opiniao/opiniao-dn/convidados/sobre-o-valor-das-propinas-10012407.html/. [4]

Nordic Co-operation (n.d.), *Student housing in Finland*, https://www.norden.org/en/info-norden/student-housing-finland. [36]

OECD (2025), *Consumer price indices (CPIs, HICPs), COICOP 1999*, https://data-explorer.oecd.org/. [6]

OECD (2023), *Education at a Glance 2023: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/e13bef63-en. [3]

OECD (2022), "Resourcing higher education in Ireland: Funding higher education institutions", *OECD Education Policy Perspectives*, OECD Publishing, Paris, https://doi.org/10.1787/67dd76e0-en. [62]

OECD (2022), *Resourcing Higher Education in Portugal*, OECD Publishing, Paris, https://doi.org/10.1787/a91a175e-en. [32]

PNAES (2024), *Alojamento Estudantil: Índice de Preços*, PNAES, https://pnaes.pt/wp-content/uploads/2024/04/relatorio-04-2024.pdf. [29]

PNAES (2024), *Atualização 5/06/2024*, https://pnaes.pt/observatorio-alojamento-estudantil/. [42]

PNAES (2023), *Requalificação e construção residências para estudantes do ensino superior 2022-2026*, PNAES, https://pnaes.pt/wp-content/uploads/2023/09/Brochura_PNAES_082023.pdf. [33]

Salmi, J. and A. D'Addio (2021), "Policies for achieving inclusion in higher education", *Policy Reviews in Higher Education*, Vol. 5/1, https://doi.org/10.1080/23322969.2020.1835529. [60]

Scott-Clayton, J. (2011), "On money and motivation: A quasi-experimental analysis of financial incentives for college achievement", *Journal of Human Resources*, Vol. 46/3, pp. 614-646, https://doi.org/10.3368/jhr.46.3.614. [44]

SOA Association (n.d.), *Opiskelijan oma koti*, https://www.soa.fi/. [37]

State Study Fund (n.d.), *Government-backed loans*, https://vsf.lrv.lt/lt/studentams/vrpaskolos/. [25]

Steiner, V. and K. Wrohlich (2012), "Financial Student Aid and Enrollment into Higher Education: New Evidence from Germany", *Scandinavian Journal of Economics*, Vol. 114/1, pp. 124-147, https://www.jstor.org/stable/41407779. [23]

Teixeira, P. et al. (2022), "Competition and diversification in higher education: Analysing impacts on access and equity in the case of Portugal", *European Journal of Education*, Vol. 57, pp. 235-254, https://doi.org/10.1111/ejed.12501. [1]

Vethaak, H. et al. (2025), "Deter and Deteriorate: The Effects of Application Processing Times on Welfare Receipt and Employment", *IZA - Institute of Labor Economics*, https://www.iza.org/publications/dp/17839/deter-and-deteriorate-the-effects-of-application-processing-times-on-welfare-receipt-and-employment (accessed on 11 June 2025). [48]

Notes

[1] This sum can be contextualised by comparing it with a household where the parents earn the minimum wage. In 2024, the monthly minimum wage was EUR 820, corresponding to an annual minimum wage of EUR 11 480 for a 14-month wage. In a household with two parents working full time at minimum wage and two children, the gross per-capita family wage would therefore be EUR 5 740. This family per-capita income (disregarding of any family benefits for which they may be eligible) would mean that the family would only be eligible to the minimum grant level.

[2] Mobile or “displaced” students are defined as students aged 25 or younger who attend a higher education institution more than 50 km from their parental home and enrolled in a programme to which it is impossible to commute by public transport from their parental home.

[3] Beyond widening the eligibility to the housing supplement, the law from Assembly of the Republic determines that the income tax brackets should be used, rather than the current adjustment for family income used in the system. While the current adjustment divides the total household income by the number of people in the household, the adjustment to determine the tax bracket divides the income between two spouses only.

5 Access to information and personal motivation

This chapter focuses on students' access to information and personal aspiration to engage in studies as key factors for participation and success in higher education. It considers how aspirations differ among young people with different socio-economic backgrounds and explains the socio-economic gaps in the consistency of young people's career plans with their educational plans. It then investigates the role of secondary schools in providing career guidance, higher education institution outreach initiatives, and informal advice from close friends and family, and explores implications for policy.

5.1. Introduction and key findings

In addition to the two necessary conditions discussed in previous chapters – having sufficient prior academic achievement and having access to sufficient funding – students also need to have information about the kind of opportunities that are available to them in order to take practical steps to achieve them. Schools can and do play an important role in providing career guidance to students across OECD member countries, but young people may also seek or receive guidance from other sources. As observable factors, such as secondary education achievement and financial constraints, cannot fully explain the socio-economic gap in higher education participation between lower and higher income groups, an important role is likely played by unobservable factors. Peer effects and family influences can vary systemically with underlying socio-economic differences across populations but are difficult to capture in observable data.

International research on behavioural economics suggests that access to information can be important to understand application and enrolment behaviour: when thinking about how to approach complex decisions with numerous sets of possibilities – such as those related to participation in higher education – people tend to rely on readily available information such as advice from family members (Lavecchia, Liu and Oreopoulos, 2016[1]; Scott-Clayton, 2011[2]; Hoxby and Turner, 2015[3]; Hoxby and Turner, 2013[4]; Carrell and Sacerdote, 2017[5]). However, relying on readily available information from close family members, friends and school may not always be the most appropriate approach for young people, particularly since parents and other relatives themselves have a limited set of personal experience with different pathways through education.

This chapter starts by considering socio-economic gaps in aspirations and access to information among different population groups. It subsequently considers how these gaps are influenced and shaped by formal career advice provided via secondary schools and advice from families.

Key findings and recommendations

Key findings

Research evidence suggests that there are considerable differences in how young people from lower socio-economic and higher socio-economic backgrounds think about their future. Students from lower socio-economic backgrounds are less likely than students from higher socio-economic backgrounds to aspire to high-skilled jobs or to expect to complete higher education.

Data from Portugal indicate that there is a mismatch between study plans and expectations on the labour market, and the gap is larger for students from socio-economically disadvantaged backgrounds. In Portugal, one-third (33%) of students who aspire to work in high-skilled jobs do not expect to complete higher education. This misinformation gap is greater for students from lower socio-economic backgrounds than for students from higher socio-economic backgrounds.

It is positive that career counsellors – in the form of psychologists – are required to be present in all public secondary educations in Portugal, but many students lack formally scheduled time with their career advisors. Just a little over three in five (62%) 15-year-olds report having spoken to their school career advisor. Students attending socio-economically disadvantaged schools are more likely than students attending socio-economically advantaged schools to miss out on time with school career counsellors.

It is not clear that the current organisation of information flows and career advice are working in the most effective way to reach all relevant student groups. Focus group participants report that schools and psychologists struggle to absorb the most relevant and recent information on current government policy

and opportunities for their students. These challenges are reportedly exacerbated by the wide remit of school psychologists and difficulties in identifying the most appropriate information.

Qualitative evidence from focus groups conducted within the scope of this project suggests that family advice and the influence of social networks are still highly relevant for many young people in Portugal, especially if they lack access to formal, high-quality career advice from their school. This is likely to contribute to consolidating rather than changing the intergenerational transmission of educational aspirations and attainment.

Higher education institutions also interact with secondary education students directly, although it seems that these outreach activities do not reach all students. While a majority of 15-year-olds report researching for career and study opportunities online, fewer students in Portugal than across the OECD member countries have attended organised tours of institutions or visited job fairs.

Policy recommendations

1. Improve the access to resources for staff involved in career guidance and vocational development for students in upper secondary education (years 10-12).
2. Develop an Educational Community Outreach Programme to organise career advice that occurs outside of secondary education, including higher education outreach activities and community mentoring initiatives.

5.2. Educational aspirations among students in Portugal are sometimes misaligned with their labour market expectations

Data from the OECD's Programme for International Student Assessment (PISA) show that the aspirations gaps between young people from lower socio-economic backgrounds and higher socio-economic backgrounds are greater when it comes to plans to attend higher education programmes than when thinking about dream jobs. This mismatch between educational and labour market aspirations among socio-economically disadvantaged young people is higher in Portugal than on average in OECD member countries, suggesting that more disadvantaged students lack key information about what it takes to get their dream job.

Expectations and aspirations have been shown to be important for students' future careers. Studies using longitudinal data from the United Kingdom suggest that 16 year-olds who underestimate the level of education required for their desired profession are disproportionately likely to not be in employment, education or training by the age of 20 (Yates et al., 2010[6]) (Musset and Kurekova, 2018[7]).

5.2.1. Considerable educational aspirations gaps exist between students from different socio-economic backgrounds in Portugal

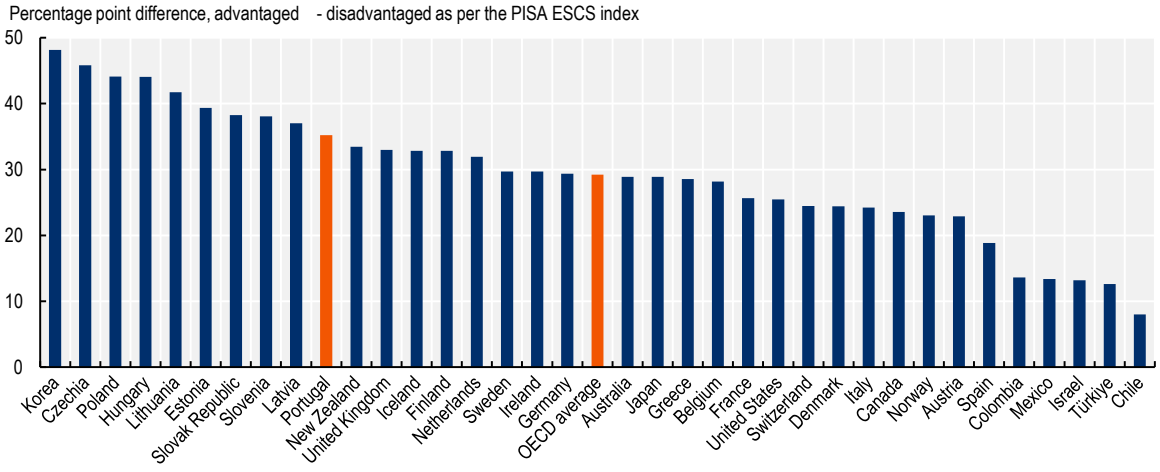
There are significant socio-economic gaps in young people's aspirations in terms of education. Data from PISA 2022 show that 91% of the most socio-economically advantaged 15-year-olds in Portugal expect to complete higher education, compared to just 56% of the least advantaged young people. This socio-economic gap is larger in Portugal than across the OECD member countries on average (Figure 5.1). More detailed, earlier data from PISA 2018 suggest that this gap in aspirations is not simply due to differences in academic performance at school: just 75% high-achieving disadvantaged students in Portugal expect to complete tertiary education while 97% of high-achieving advantaged students do (OECD, 2019[8]).

When important background factors are controlled for, socio-economically advantaged students in Portugal are considerably more likely than their more disadvantaged peers to expect to complete higher education, according to previous OECD analysis (OECD, 2024[9]). The analysis finds that socio-economically

advantaged students in Portugal are around seven times more likely than socio-economically disadvantaged students to expect to complete higher education, when accounting for gender, migrant status, reading performance and study orientation. By comparison, across the OECD member countries on average, socio-economically advantaged students are around five times more likely than socio-economically disadvantaged students to expect to complete higher education, using the same controls (OECD, 2024[9]).

Figure 5.1. The educational aspirations gap in Portugal is stronger than across OECD member countries

Percentage point difference between the top and bottom quarter of the PISA index of Economic, Social, and Cultural Status (ESCS) in the proportion of students who expect to complete higher education (at least ISCED level 5), 2022



Note: For Australia, Canada, Denmark, Latvia, Netherlands, New Zealand, the United Kingdom and the United States, caution is required when interpreting estimates because one or more PISA sampling standards were not met (see Reader's Guide, Annexes A2 and A4). The sample covered is at least 75% of the population except for in Austria, Belgium, Chile, Colombia, Denmark, Germany, Iceland, Slovak Republic, Switzerland and the United Kingdom where at least 50% but less than 75% was covered. ESCS refers to the PISA index of economic, social and cultural status. All values are statistically significant.
Source: PISA 2022 in PISA (2024[10]), Volume V, OECD.

Qualitative evidence from project focus groups helps to explain the mindset of secondary school students. Focus group participants report that students who are enrolled in general orientations in secondary education and come from high-income families tend to actively seek to continue their studies upon completion of secondary education. By comparison, students from disadvantaged backgrounds who attend general orientations can suffer from lower aspirations due to lower self-esteem and a lack of belief in their own study skills and aptitude for higher education, which is compounded by a lack of financial resources. The vicious cycle of low income and low aspirations is also highlighted by project stakeholder survey respondents when asked to identify the most important barrier to participation among lower-income students in their own words:

> *"The lack of money and the perception that the lack of money prevents higher studies, limits expectations and ambitions from the beginning of secondary education."*

This could mean that lower-income students who could have been very successful in higher education based on their academic performance end up not pursuing studies because they lack the aspiration and confidence to realise their potential. In practice, students from lower socio-economic backgrounds might apply to less selective courses than they could have feasibly enrolled in, given their grades. Research from Portugal finds that students whose parents have not attained higher education are more likely to apply to lower-quality

programmes relative to their own grades compared with their peers with tertiary-educated parents (Silva et al., 2025[11]) (see Chapter 3 for more on the admissions system).

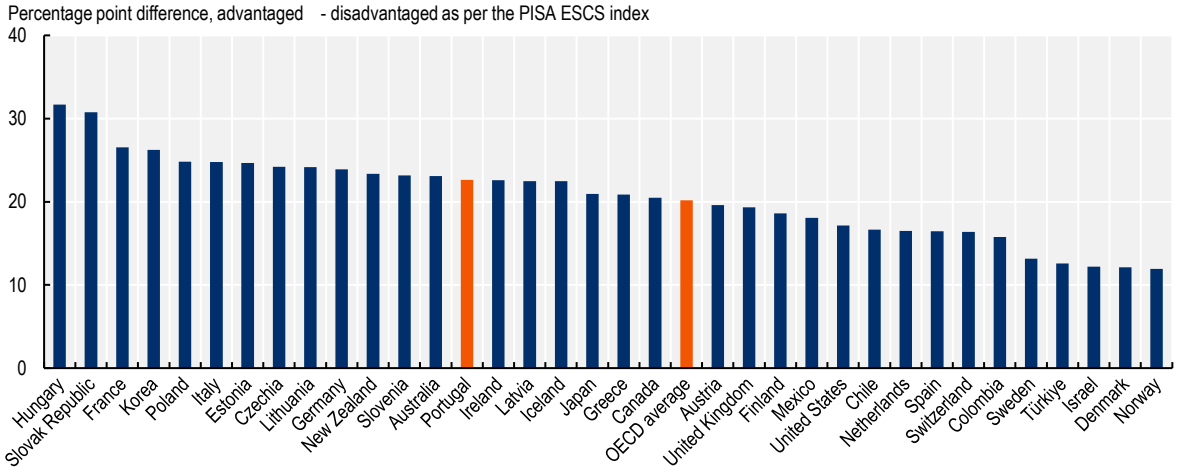
5.2.2. Many 15-year-olds have misaligned labour market expectations and educational attainment plans

Many young people in Portugal aspire to work in the highest skilled jobs, that is, the occupational roles of managers or professionals. Out of 15 year-olds in Portugal, 48% report wanting to work as managers or professionals, which is above the OECD member country average, at 38%, and in line with figures seen in, for instance, Australia (48%), Spain (49%), and Korea (49%) and considerably higher than other European neighbours like France (34%) or Germany (24%) (OECD, 2023[12])

Aspirations gaps between young people from lower and higher socio-economic backgrounds tend to be slightly higher in Portugal than across OECD member countries. The socio-economic gap in career aspirations between students with lower and higher socio-economic backgrounds in Portugal (23 percentage points) is slightly higher than OECD member countries on average (20 percentage points) (Figure 5.2) (OECD, 2024[9]). The socio-economic aspirations gap in Portugal is greater than in countries like Spain, Ireland and the United Kingdom, and smaller than in countries like Germany and France.

Figure 5.2. Socio-economic gaps in career aspirations are roughly in line with the OECD average

Percentage point difference between the top and bottom quarter of the PISA index of Economic, Social, and Cultural Status (ESCS) in the proportion of students who expect to work as a manager or professional, 2022

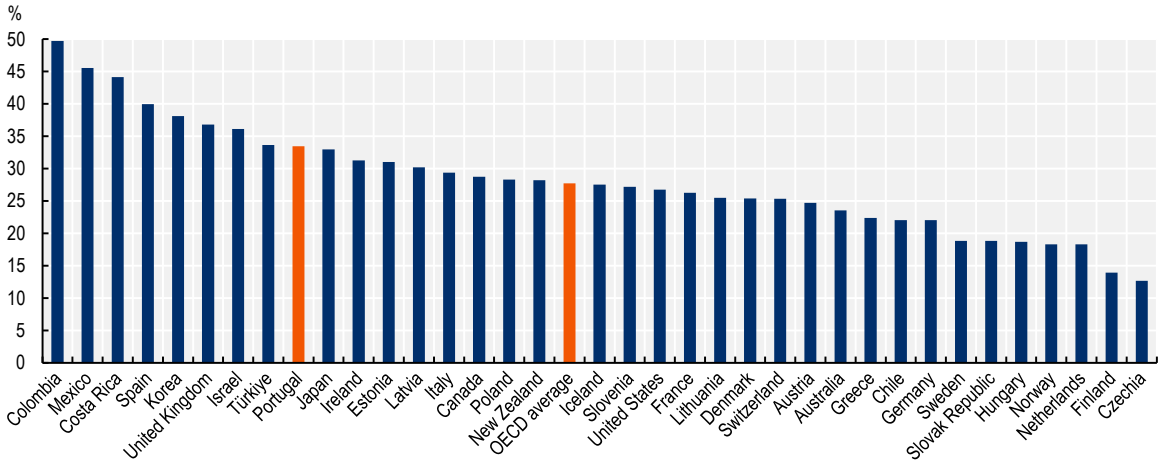


Note: For Australia, Canada, Denmark, Ireland, Latvia, Netherlands, New Zealand, the United Kingdom and the United States, caution is required when interpreting estimates because one or more PISA sampling standards were not met (see Reader's Guide, Annexes A2 and A4). The sample covered is at least 75% of the population except for in Austria, Chile, Czechia, Denmark, France, Germany, Hungary, Iceland, Latvia, Lithuania, Slovak Republic, Switzerland and the United Kingdom where at least 50% but less than 75% was covered and in Belgium where less than 50% was covered. Data of Belgium represent only the French-speaking and German-speaking Communities. All values are statistically significant.
Source: PISA 2022 in PISA (2024[10]), Volume V, OECD.

However, many of the young people with ambitious labour market expectations in Portugal are not planning on taking the necessary educational steps to reach their goals. Figure 5.3 illustrates that one-third (33%) of 15-year-olds who expect to work as a manager or professional do not expect to complete higher education in Portugal. This proportion is greater than across OECD member countries, where a slightly lower average share of 15-year-olds (28%) think they will work in the highest skilled jobs without first attending higher education programmes.

Figure 5.3. Some students may not realise that their dream job requires a higher education degree

Proportion of students who expect to work as a manager or professional but do not expect to complete a higher education degree (at least ISCED 5), 2022



Note: For Australia, Canada, Denmark, Ireland, Latvia, Netherlands, New Zealand, the United Kingdom and the United States, caution is required when interpreting estimates because one or more PISA sampling standards were not met (see Reader's Guide, Annexes A2 and A4). The sample covered is at least 75% of the population except for in Austria, Chile, Czechia, Denmark, France, Germany, Hungary, Iceland, Latvia, Lithuania, Slovak Republic, Switzerland and the United Kingdom where at least 50% but less than 75% was covered and in Belgium where less than 50% was covered. Data of Belgium represent only the French-speaking and German-speaking Communities. All values are statistically significant.
Source: PISA 2022 in PISA (2024[10]), Volume V, OECD.

PISA 2018 found that such misaligned expectations also tend to be more prevalent among students with lower socio-economic backgrounds than among students with higher socio-economic backgrounds (OECD, 2019[13]). Previous OECD research has calculated the relative likelihood of students from low socio-economic backgrounds being misaligned in their career aspirations and their educational expectations with reference to students from high socio-economic backgrounds. The authors find that students from low socio-economic backgrounds in Portugal are nearly seven times more likely than students from high socio-economic backgrounds to be misguided, when controlling for background characteristics. Previous OECD research finds that this odds ratio in Portugal is the second highest, after Poland, across the OECD member countries where data are available (OECD, 2024[9]).

This mismatch in career and educational expectations indicates that students lack information and knowledge about requirements for their desired careers, and that students from lower socio-economic backgrounds are particularly affected.

5.3. Most students in Portugal can access career advice in school, but information from social networks tends to vary by socio-economic background

Career advice can contribute to ensuring that students choose a post-secondary study programme that is a good fit for their skills and future plans (OECD, 2024[9]). It is important for students to enjoy their subject area of study and to feel that their experiences during their studies correspond adequately with the expectations they had before applying. Delivering high-quality career advice through secondary school is an effective way for governments and institutions to engage with the great majority of young people through universal policies.

Stakeholders participating in project focus groups generally believed the vocational and psychological support initiatives in place play an important role in promoting access to higher education for students from

more disadvantaged families. They particularly experienced that these initiatives can make the greatest difference when working with students from lower socio-economic backgrounds, who may lack the informal access to information, support and encouragement that is often in place within highly educated families. They can also play an important role in promoting students' self-esteem, motivation and capabilities where parents are not able to do so.

5.3.1. Most students can access some career advice through their school in Portugal, but career advisors struggle to fulfil their mission

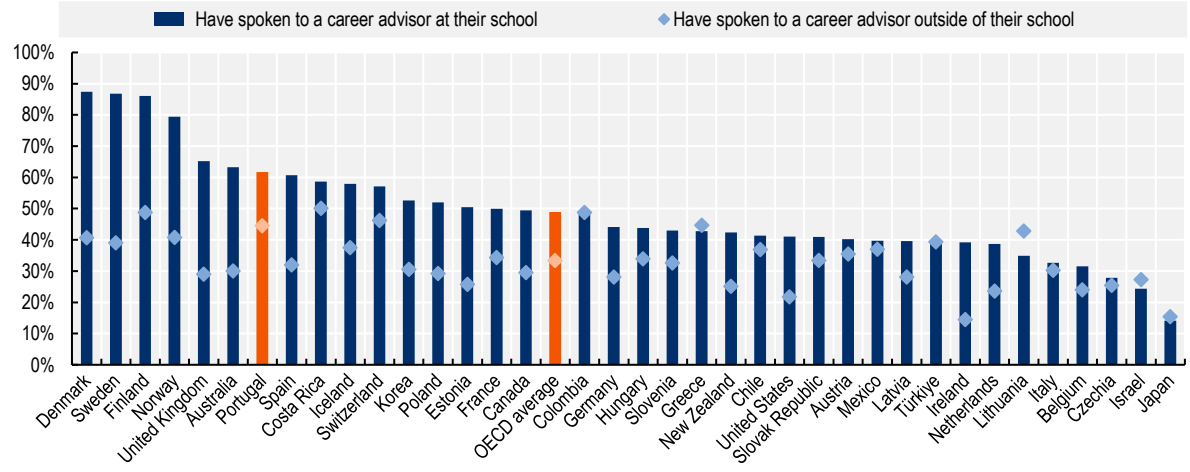
Delivering career guidance through schools helps ensure a wide reach for these services, but there are challenges in ensuring the quality of services. Most students in Portugal have access to career advice through the extensive network of psychologists in schools, who also engage with teachers, parents and other stakeholders throughout the guidance process (Euro guidance, 2021[14]).

In Portugal, all public schools are required to have guidance services, and the Directorate-General for Education (*Direção-Geral da Educação*, DGE) is responsible for designing guidelines and instruments to support the activity of psychologists, promoting continuous training actions, and increasing networking and peer learning (DGE, 2023[15]). While career advice is mandatory before entering upper secondary education (in ninth grade), it is also available, but not mandatory, in 12th grade. Correspondingly, Figure 5.4 indicates that a majority (62%) of 15-year-olds in Portugal have spoken with a career advisor at their school, which is above the OECD average (49%).

The wide coverage of career guidance in schools is similarly reflected in 2018 PISA figures for Portugal, which suggest that 94% of students go to schools where at least one specific guidance counsellor is employed at school or regularly visit the school. There are small differences between socio-economically disadvantaged and advantaged schools in this regard: 85% of students in disadvantaged schools and 98% in advantaged schools have access to at least one counsellor (Table II.B1.6.9 in PISA (2019[13])).

Figure 5.4. A little over three in five 15-year-olds report having spoken to their school career advisor

Proportion of students who report that they have spoken to a career advisor at their school or outside of their school, 2022



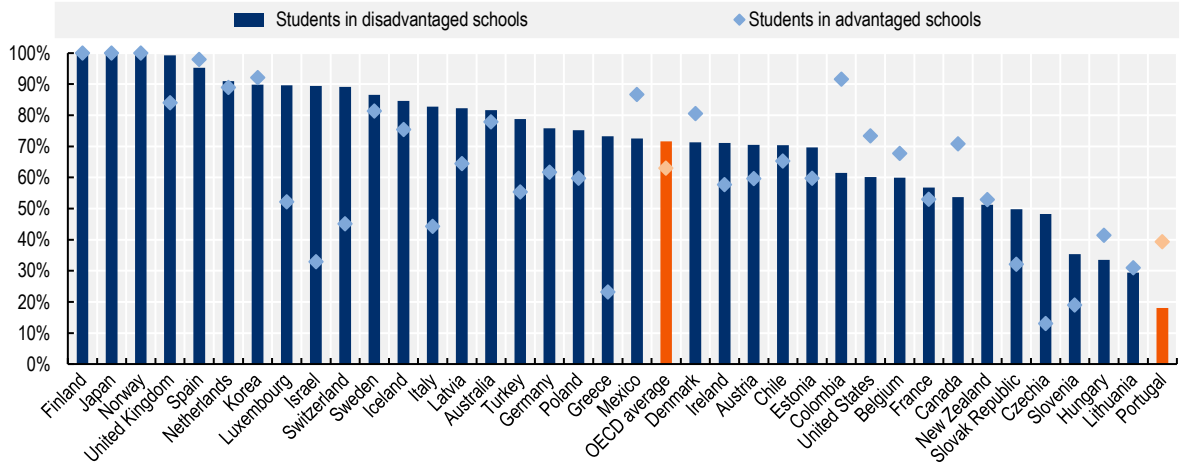
Note: For Australia, Canada, Denmark, Ireland, Latvia, Netherlands, New Zealand, the United Kingdom and the United States, caution is required when interpreting estimates because one or more PISA sampling standards were not met (see Reader's Guide, Annexes A2 and A4). The sample covered is at least 75% of the population except for in Belgium, Chile, Colombia, Denmark, Iceland, Israel, Switzerland and the United Kingdom where at least 50% but less than 75% was covered.
Source: PISA 2022 in PISA (2024[10]), Volume V, OECD.

However, the secondary education attended can have an important influence on students' knowledge of career options where schools are the unit that organises formal career guidance. Even though central guidelines exist to ensure minimum requirements across schools, the implementation at the school level is dependent on school resources and priorities, not least between schools with different demographics or across public and private establishments.

While career guidance services exist, career guidance is rarely formally scheduled into students' time in school in Portugal compared with other OECD jurisdictions: in PISA 2018, there are socio-economic differences in the proportion of students who have formally scheduled time with career advisors. Just 18% of students in the most disadvantaged schools have formally scheduled advice, compared with 39% in the most advantaged schools (Figure 5.5).

Figure 5.5. Students in disadvantaged schools lack formally scheduled time for career advice

Percentage of students in socio-economically advantaged and disadvantaged schools where career guidance is formally scheduled into the students' time, 2018



Note: Advantaged and disadvantaged schools refer to their classification according to the PISA index of economic, social and cultural status. For the Netherlands, Portugal and the United States, data did not meet the PISA technical standards but were accepted as largely comparable (see Annexes A2 and A4). The sample is restricted to schools where career guidance is provided, with the modal ISCED level for 15-year-old students (see Annex A3 and C1)
Source: PISA (2019[13]), Table II.B1.6.10, Volume II, OECD.

School psychologists have the primary responsibility for providing career advice in Portugal, although they face the challenges of having a wide remit and dealing with reported staff shortages. Career advisors aim to improve educational success, reduce early school leaving rates, and improve the adjustment between young people's skills, aspirations and the needs of the labour market (DGE, 2023[15]). Staff are tasked with helping students understand their opportunities, for instance by providing information on the offer of education and training at the national and local level; organising study visits and mobility experiences; encouraging volunteering, internships and job shadowing. Alongside this, they also support students in the process of developing their identity; foster autonomy in search of information; support the acquisition of career management skills; support information and awareness among parents and the community on career decisions (Euro guidance, 2021[14]).

Beyond running the required career guidance programmes, many schools also run additional initiatives, including information sessions for families, students and head teachers; career intervention programmes in

partnership with local universities; open days to provide information and support with applications; open days at universities; opportunities fairs; and sessions with alumni.

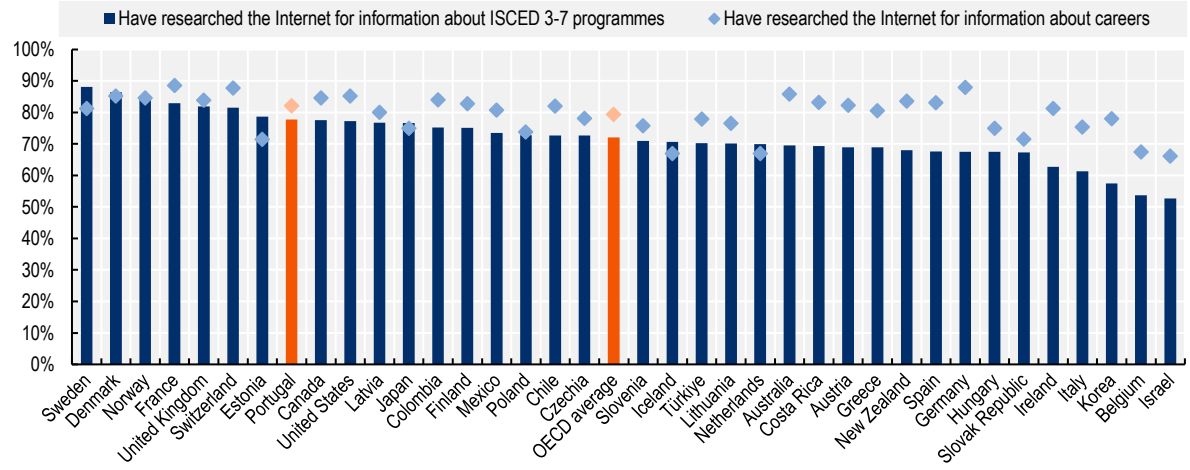
Career advisors play a role in supporting students' autonomous search for information

Supporting students' autonomy in finding the information they need can be a valuable approach. As Figure 5.6 illustrates, the majority of students in Portugal, as well as in other OECD countries, report searching for information about education and career opportunities online. Consultations held in Portugal within the scope of this project suggest that online resources, including government-provided database "Infocursos" as well as third-party information providers, such as "Brighter Future", provide students with relevant information.

It could be valuable to further build on these resources to improve students' access to information on the most frequently used existing platforms. For example, further information could be provided on career options and alternatives for further study associated with different pathways by further consolidating information from different existing sources. The user experience could also be enhanced to improve the access to useful programme statistics. For example, information could be offered through personalised tools, potentially drawing on "MyProjectSup" (Box 5.1).

Figure 5.6. The majority of students search for information about their opportunities online

Proportion of students who report that they have researched the Internet and for information about ISCED 3-7 programmes or for information about careers, 2022



Note: For Australia, Canada, Denmark, Ireland, Latvia, Netherlands, New Zealand, the United Kingdom and the United States, caution is required when interpreting estimates because one or more PISA sampling standards were not met (see Reader's Guide, Annexes A2 and A4). The sample covered is at least 75% of the population except for in Belgium, Chile, Colombia, Denmark, Iceland, Israel, Switzerland and the United Kingdom where at least 50% but less than 75% was covered.
Source: PISA 2022 in PISA (2024[10]), Volume V, OECD.

Career advisors could benefit from access to improved tools for career guidance

The project focus group participants report that schools and psychologists struggle to absorb the most relevant and recent information on current government policy because of the wide remit relative to the resources available. Project focus group participants explain that the relevant information rarely comes directly from the relevant authorities, and that official information on the websites can be unclear. For instance, participants report the perception that the website of the Directorate-General of Higher Education

(*Direção-Geral do Ensino Superior*, DGES) provides a good overview of the government policy in place, but that it is difficult to navigate.

Moreover, a research report finds that there is a lack of clarity, structure and searchability on higher education institutions' websites (Mateus, 2023[16]). Project focus group participants also report that higher education institutions instead tend to send out relevant information by email to all, or a set of, schools, and that psychologists often lack the capacity to review, absorb, and present this information to students in a holistic way at the right time.

It would therefore be useful improve the access to resources for staff involved in career guidance and vocational development for secondary education students in upper secondary education (years 10-12). This could involve consolidating the available information, limiting ad hoc communication by email, and sharing it in a clear form in one resource targeted specifically to career guidance teams. Resources could be provided through a national career guidance hub and could consolidate existing information. It would be useful to integrate information on pathways and support from DGES and institutions with information on programmes and opportunities for further study from the website "Infocursos" and the application guide, as well as tools and templates for career guidance activities. For example, while Infocursos in Portugal currently includes a substantial body of relevant information, it has not yet prioritised user experience and is not integrated with other information and tools.

Inspiration for a more user-friendly and integrated platform could draw on the information portal and admissions system "Parcoursup" in France, which provides information and guidance to teaching teams and secondary education students, integrating "MyProjectSup" that offers personalised suggestions for post-secondary school opportunities based on students' grade profiles and aspirations (Government of France[17]; Hakimov, Schmacker and Terrier, 2023[18]; Parcoursup[19]). Such a career guidance hub could be developed and managed by the government in collaboration with a third party in the non-profit sector, perhaps building on an existing platform such as "Brighter Future", managed by the José Neves Foundation (José Neves Foundation[20]) (Box 5.1).

In the medium term, DGE and the Directorate-General for School Establishments (*Direção-Geral dos Estabelecimentos Escolares*, DGEstE) could work with schools on encouraging collaboration and the sharing of good practice across schools, setting standards for a minimum set of activities and inspiration for development, drawing inspiration from the development of the Quality Agenda in schools in the Netherlands. The Dutch Quality Agenda for Secondary Education Career Guidance was devised through broad stakeholder collaboration, to help autonomous schools develop and improve comprehensive approaches to career guidance delivery. It lists minimum standards for a good model of career guidance, and includes sections on policy, activities, guidance and quality assurance (VO-Raad, 2021[21]). When tools and practices are optimised, it might be useful to review whether the human resources allocated to career guidance for students in the final years of secondary education are adequate and fit for purpose (Box 5.1).

Box 5.1. Tools for career guidance in secondary educations in France and the Netherlands

France is implementing MyProjectSup, a national tool targeted to secondary education students and their teachers and offering personalised information and guidance. The tool was launched in 2023 and is integrated into the French applications and admissions platform Parcoursup. At the time of writing, the tool is still under development. It is an evidence-based intervention in that it is inspired by an impact evaluation by Hakimov, Schmacker and Terrier (2023[18]). The evaluation focuses on students' over- and under-confidence in terms of their grades relative to the grades required for the programmes they plan to apply to. The authors finds that academically strong students who were under-confident were more aware of their talent following the information treatment, which in turn means that they apply to better-matched higher education programmes. The authors find that the effects from the experiment are greater for women and for students with lower socio-economic backgrounds (Hakimov, Schmacker and Terrier, 2023[18]).

The **Dutch Quality Agenda for Secondary Education Career Guidance** has been devised through broad stakeholder collaboration, to help autonomous schools develop and improve comprehensive approaches to career guidance delivery. The Quality Agenda sets out a list of the minimum standards that form the basis for a good model of career guidance, including sections on policy, activities, guidance, and quality assurance (VO-Raad, 2021[21]). Research from the Netherlands shows that students who meet with a secondary school counsellor to discuss higher education programme choices tend to be happier with their choice after graduating from their programme. The authors found the greatest impact of career counselling was on men and students from low socio-economic backgrounds (Borghans, Golsteyn and Stenberg, 2015[22]).

5.3.2. Qualitative evidence suggests that socio-economic background influences student decisions through informal advice

The gaps in career advice in schools in Portugal mean that there is still a substantial role for informal and personal advice from young people's social networks, and such informal advice can vary considerably depending on the personal experience of those providing the advice. As Figure 4.3 shows, not having family support is perceived by project stakeholder survey respondents to be the fourth most important barrier for lower-income students, after the three top financial barriers listed.

When students rely on family and personal networks for advice and support, this increases the influence – and associated risks – of significant differences in the support and information young people receive depending on their family background. Students whose family members have not attained higher education tend to be at greater risk of facing low emotional support and practical advice drawn from personal experience from their closest social circle, and recent research finds that social influence is particularly strong between peers from similar socio-economic backgrounds (Hovestadt and Lorenz, 2025[23]). In interviews with stakeholders from the higher education sector conducted for this project, participants repeatedly expressed worries about the lack of academic and emotional support from students who were the first in their family to enrol. One project stakeholder survey respondent highlights this issue:

> *"No matter how much information there is, if a student from a disadvantaged socio-economic environment does not interact with people who have attended higher education, they may doubt that they belong to this environment."*

Qualitative evidence from focus groups collected for this project suggests that family can also exert influence on students in vocational programmes, where young people are requested to work as soon as possible after leaving secondary education, with families perceiving that career paths taken by relatives are more stable

and secure than enrolling in higher education. Project focus group participants highlight that these family pressures are important both in terms of choosing study orientation in secondary education and when making decisions related to higher education participation.

Furthermore, project focus group evidence highlights a pervasive discourse that undervalues higher education among many lower-income families, but also among stakeholders who have engaged with the project. For instance, one stakeholder survey respondent states: “Many students devalue school and higher education and prefer to work because they do not see a higher education course as a way of obtaining better pay." Another stakeholder responding to the project stakeholder survey notes that:

> *“They [students] believe that higher education does not pay off [...]. They believe that personal and financial investment does not have a salary return. This is what they say when they clarify the reason that prevents them from attending higher education.”*

This is somewhat surprising since OECD evidence indicates that higher education qualifications do tend to pay off in Portugal, compared to not having studied. 25-34 year-olds with tertiary education earn 58% more on average than their peers with only upper secondary education, compared with 39% more across OECD member countries. There is evidence to suggest that this return to education rises over time – with 45–54 year-olds with a tertiary qualification earning 91% more than those with secondary education attainment – although changing labour market conditions and skills demand may influence the returns achieved by younger generations as they progress in their careers (OECD, 2024[24]). There will also be significant differences in labour market returns across different higher education programmes. It is possible that these perceptions, to some extent, are shaped by international comparisons which show that Portuguese wages tend to be lower than in neighbouring European countries.

Qualitative evidence from focus groups also suggests that some families are reluctant to give up the income that would come from a young person starting work immediately after secondary education – and which would be foregone if the young person pursues higher education. Respondents to the project stakeholder survey even suggest that some lower-income students start working during secondary education, which infringes on their capability to undertake extra hours of schoolwork to prepare for national exams, as well as taking hours away from curricular schoolwork.

Lower-income students who do aspire to attend higher education can be strongly motivated to improve their socio-economic status. Project focus group participants agree that personal ambition may explain why some students succeed in pursuing their studies despite significant challenges but emphasise the amount of resilience required to achieve this. For instance, a stakeholder survey respondent highlights that "it takes a huge motivational effort to break this barrier and understand that higher education can also be for them and that it is possible to be successful”. In these cases, there is a perception and confidence that this will lead to life improvements, both for themselves and their families.

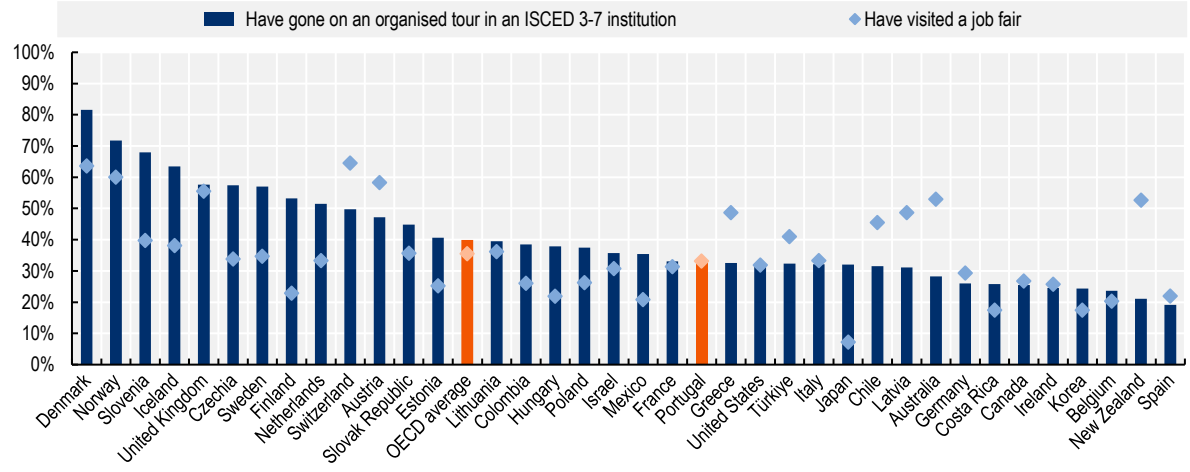
5.3.3. Higher education institutions also play a key role in the dissemination of information about opportunities

While secondary school career guidance teams play an important role, the higher education sector also engages directly with prospective students, including through the information that institutions provide online. The higher education sector also engages directly with prospective students on a more personal basis, through engagement in careers fairs, school visits, open days and week-long residentials aimed at secondary education students. It emerged through project stakeholder interviews that many higher education institutions in Portugal take part in several such outreach activities throughout the year, targeting all or a selection of schools. It also emerged that these outreach activities occur at the initiative of secondary schools or higher education institutions, without central organisation. While it is promising that some career fairs and school visits seem to benefit from a third-party non-profit organiser, it is not clear that these activities are supported through national policy. Other activities, including the distribution of written information by email

to schools, and certain school visits, seem to occur on an ad hoc basis and mainly target students from groups where institutions have traditionally recruited students. According to PISA 2022, fewer students in Portugal than across OECD member countries in general have taken part in organised tours or visited job fairs, suggesting more could be done to expand coverage (Figure 5.7).

Figure 5.7. Fewer students in Portugal than across OECD member countries have attended organised tours or visited job fairs

Proportion of students who reported that they have attended an organised tour in an ISCED 3-7 institution or visited a job fair, 2022



Note: For Australia, Canada, Denmark, Ireland, Latvia, Netherlands, New Zealand, the United Kingdom and the United States, caution is required when interpreting estimates because one or more PISA sampling standards were not met (see Reader's Guide, Annexes A2 and A4). The sample covered is at least 75% of the population except for in Belgium, Chile, Colombia, Denmark, Iceland, Israel, Switzerland and the United Kingdom where at least 50% but less than 75% was covered.
Source: PISA 2022 in PISA (2024[10]), Volume V, OECD.

Outreach activities that specifically target student groups who already tend to transition to higher education risk missing out on their full potential of widening access to higher education, since they may exclude schools with the least-informed students. There would therefore be value in building on existing higher education outreach programmes by providing some resource that ensures its strategic organisation to ensure relevant coverage and quality. It might be appropriate to encourage a third-party, non-profit specialised organisation to provide this service by developing an Educational Community Outreach Programme to organise career advice that occurs outside of secondary education, including higher education outreach activities and community mentoring initiatives.

With this purpose in mind, DGE and DGES could collaborate with higher education institutions and third-party, non-profit organisations to fund the training of designated mentors, integrating student and community volunteers for in-person and online mentoring for secondary education students. This could build on and develop existing higher education institution outreach programmes, while widening school coverage. These activities could draw on mentoring programmes in Germany, including, for example, Talent scouting North Rhine-Westphalia (NRW), with trained mentors from higher education institutions and "Rock Your Life!", building on peer-mentoring elements (Erdmann et al., 2022[25]; Resnjanskij et al., 2024[26]; OECD, 2024[27]). Another example involving the wider community as volunteers for counselling activities is the ArbeiterKind programme in Berlin, Germany (ArbeiterKind.de[28]; Tupan-Wenno et al., 2016[29]) (Box 5.2).

Box 5.2. Community outreach activities in Germany

Mentors trained and sent by higher education institutions have also been shown to be effective in promoting access to higher education in Germany. The programme **Talent scouting North Rhine-Westphalia (NRW), in Germany,** is an advisory service that provides one-to-one personally tailored career and educational counselling and career activities to secondary education students. Counsellors ("talent scouts") are trained and sent to secondary schools from nearby universities. Participation is voluntary and open to interested students in relevant academic tracks. The programme aims to help students develop key psychosocial skills, support the post-secondary educational process, and to encourage students to enrol in university. Counselling interactions remain available to students even after they have started post-secondary study (Erdmann et al., 2022[25]).

Another programme in Germany relied on peer mentors rather than professional mentors. **"Rock Your Life!" is a German** mentoring programme that connects university students with school students in the last two years of lower secondary education. The mentors and mentees are expected to meet every two weeks during a period of one to two years (OECD, 2024[27]). Mentors are expected to support students in dealing with stressful situations and offer them guidance regarding their future careers. Researchers designed a randomised controlled trial between 2015 and 2018 and find that three years after the programme, mentored students had improved mathematics performance and developed clearer career plans, which supports well-matched educational and career pathways. The most substantial improvements were among the most disadvantaged students, many of whom came from migrant families. Since its launch in Germany, the Rock Your Life! programme has expanded to countries including the Netherlands and Switzerland (Resnjanskij et al., 2024[26]).

"ArbeiterKind.de" in Berlin, in Germany, goes beyond providing mentoring support at the level of the institution. A grassroots initiative founded by Katja Urbatsch in 2009, "ArbeiterKind.de" started as a website and has now grown into Germany's largest community for first-generation higher education students. Across Germany, 80 local groups are run by 6,000 centrally supported volunteers. It aims to inform students about educational opportunities and provides one-to-one and group-based learning and counselling activities to students whose parents do not have tertiary attainment, focusing on fostering positive associations in relation to higher education. It continues to offer supports to students throughout their programmes to help them successfully complete their studies and start their career. In order to continuously improve, ArbeiterKind.de runs an internal monitoring system and regularly assesses local volunteer activities and support measures (ArbeiterKind.de[28]; Tupan-Wenno et al., 2016[29]).

Policy recommendations

Key finding:

It is positive that career counsellors – in the form of psychologists – are required to be present in all public secondary schools in Portugal and that higher education institutions are actively engaging in student outreach, but it is not clear that the current organisation of information flows and career advice are working in the most effective way to reach all relevant student groups, which limits its potential to promote access to higher education, student-to-programme match and completion rates.

Recommendations:

1. Improve the access to resources for staff involved in career guidance and vocational development for students in upper secondary education (years 10-12).
2. Develop an Educational Community Outreach Programme to organise career advice that occurs outside of secondary education, including higher education outreach activities and community mentoring initiatives.

References

ArbeiterKind.de (n.d.), *ArbeiterKind*, https://arbeiterkind.de/. [28]

Borghans, L., B. Golsteyn and A. Stenberg (2015), "Does Expert Advice Improve Educational Choice?", *PlosOne*, https://doi.org/10.1371/journal.pone.0145378. [22]

Carrell, S. and B. Sacerdote (2017), "Why Do College-Going Interventions Work?", *American Economic Journal: Applied Economics*, Vol. 9/3, https://doi.org/10.1257/app.20150530. [5]

DGE (2023), *Psicologia e Orientação em Contexto Escolar*, Direção-Geral da Educação, https://www.dge.mec.pt/psicologia-e-orientacao-em-contexto-escolar. [15]

Erdmann, M. et al. (2022), "Educational inequality after high school graduation - there is a way to change that: An inquiry into the effectiveness of an intensive counseling program 1.5 years after high school graduation", *WZB Discussion Paper, No. P 2022-003, Wissenschaftszentrum Berlin für Sozialforschung (WZB)*, https://www.econstor.eu/handle/10419/260533. [25]

Euro guidance (2021), *Guidance System in Portugal*, https://euroguidance.eu/guidance-system-in-portugal. [14]

Government of France (n.d.), *MonProjetSup*, https://beta.gouv.fr/startups/monprojetsup.html. [17]

Hakimov, R., R. Schmacker and C. Terrier (2023), "Confidence and College Applications: Evidence from a Randomized Intervention", *Rationality and Competition Discussion Paper Series 377, CRC TRR 190 Rationality and Competition*, https://ideas.repec.org/p/rco/dpaper/377.html. [18]

Hanushek, E., S. Machin and L. Woessmann (eds.) (2016), *Chapter 1 - Behavioral Economics of Education: Progress and Possibilities*, Elsevier, https://doi.org/10.1016/B978-0-444-63459-7.00001-4. [1]

Hovestadt, T. and G. Lorenz (2025), "Social Network Effects on Educational Inequality: The Role of Similarity Bias in Social Influence", *Research in Social Stratification and Mobility*, p. 101071, https://doi.org/10.1016/J.RSSM.2025.101071. [23]

Hoxby, C. and S. Turner (2015), "What High-Achieving Low-Income Students Know About College", *American Economic Review: Papers & Proceedings*, Vol. 105/5, https://doi.org/10.1257/aer.p20151027. [3]

Hoxby, C. and S. Turner (2013), "Expanding College Opportunities for High-Achieving, Low-Income Students", *Stanford SIEPR Working Paper*, https://siepr.stanford.edu/publications/working-paper/expanding-college-opportunities-high-achieving-low-income-students. [4]

José Neves Foundation (n.d.), *ISA FJN Investing in your educational journey*, https://www.joseneves.org/en/isa-fjn. [20]

Mateus, A. (2023), *Sucesso e Inclusão: Medidas e Iniciativas de Apoio aos estudantes do ensino superior*, DGES. [16]

Musset, P. and M. Kurekova (2018), "Working it out: Career Guidance and Employer Engagement", *OECD Education Working Papers, No. 175*, https://doi.org/10.1787/51c9d18d-en. [7]

OECD (2024), *Challenging Social Inequality Through Career Guidance: Insights from International Data and Practice*, OECD Publishing, Paris, https://doi.org/10.1787/619667e2-en. [9]

OECD (2024), *Education at a Glance 2024: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/c00cad36-en. [24]

OECD (2024), *OECD Youth Policy Toolkit*, OECD Publishing, Paris, https://doi.org/10.1787/74b6f8f3-en. [27]

OECD (2024), *PISA 2022 Results (Volume V): Learning Strategies and Attitudes for Life*, OECD Publishing, Paris, https://doi.org/10.1787/c2e44201-en. [10]

OECD (2023), *PISA 2022 Results (Volume I) The State of Learning and Equity in Education*, OECD Publishing, Paris, https://doi.org/10.1787/53f23881-en. [12]

OECD (2019), *PISA 2018 Country Note: Portugal*, OECD Publishing, Paris, https://www.oecd.org/pisa/publications/PISA2018_CN_PRT.pdf. [8]

OECD (2019), *PISA 2018 Results (Volume II): Where All Students Can Succeed*, OECD Publishing, Paris, https://doi.org/10.1787/b5fd1b8f-en. [13]

Parcoursup (n.d.), *Parcoursup*, https://www.parcoursup.gouv.fr/. [19]

Resnjanskij, S. et al. (2024), "Can Mentoring Alleviate Family Disadvantage in Adolescence? A Field Experiment to Improve Labor Market Prospects", *Journal of Political Economy*, Vol. 132/3, https://www.journals.uchicago.edu/doi/10.1086/726905. [26]

Scott-Clayton, J. (2011), "On money and motivation: A quasi-experimental analysis of financial incentives for college achievement", *Journal of Human Resources*, Vol. 46/3, pp. 614-646, https://doi.org/10.3368/jhr.46.3.614. [2]

Silva, P. et al. (2025), "Public and Private School Grade Inflations Patterns in Secondary Education", *IZA Institute of Labor Economics*, Vol. IZA Discussion Paper No. 16016, https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4396103. [11]

Tupan-Wenno, M. et al. (2016), *Effective Approaches to Enhancing the Social Dimension of Higher Education*, Knowledge Innovation Centre, The IDEAS Consortium, https://ehea.info/media.ehea.info/file/Social_dimension/43/8/IDEAS-Final-Report_659438.pdf. [29]

VO-Raad (2021), *Kwaliteitsagenda LOB VO verlengd*, https://www.vo-raad.nl/nieuws/kwaliteitsagenda-lob-vo-verlengd. [21]

Yates, S. et al. (2010), "Early Occupational Aspirations and Fractured Transitions: A Study of Entry into 'NEET' Status in the UK", *Journal of Social Policy*, Vol. 40/3, https://doi.org/10.1017/s0047279410000656. [6]

6 Innovative approaches to non-financial support

This chapter discusses policies to promote completion rates once students arrive in higher education institutions. It highlights the value of traditional in-person tutoring and mentoring programmes to support academic achievement and student well-being before exploring the potential applications of emerging data-driven tools in supporting student success. It provides an overview of good practice for using analytical tools to support student success in Portugal and internationally and considers avenues for future policy action in Portugal specifically.

6.1. Introduction and key findings

Lower-than-desired student completion rates in higher education are a challenge facing many OECD member countries, including Portugal. When students fail to progress in higher education, there are significant impacts on individuals, as well as institutions and countries (Bound and Turner, 2011[1]). At the individual level, students who drop out of their programmes limit their expected future earnings by curtailing their access to more qualified and better-paid job opportunities (Carneiro, Heckman and Vytlacil, 2011[2]; Gunderson and Oreopolous, 2020[3]).[1] At the institutional level, negative consequences include challenges in planning revenue flows, allocating resources and the risk of experiencing reputational damage or falling short of fulfilling their social mission. At the national level, low levels of completion can limit the effect of any increased enrolment rates on overall human capital, which in turn can limit capacity for innovation and productivity growth in local and national economies.

The reasons students drop out of their programmes can be complex and influenced by students' underlying academic ability, as well as student decisions about the time and resources they choose to invest in their education. From an equity perspective, high non-progression rates can be particularly concerning if they reinforce social disparities. This can happen if the most socio-economically disadvantaged groups are disproportionately likely to drop out of their degree programmes.

This chapter summarises a longer note on student success monitoring systems, delivered to the Portuguese authorities as part of the project. It first provides an overview of the available data on student success in Portugal. It subsequently discusses ongoing initiatives to combat drop-out in higher education. Finally, it explores developments in the field of student tracking methods and considers possible avenues for the implementation of successful data-driven approaches, along with necessary conditions for scaling these approaches to a national level.

Key findings and recommendations

Key findings

Drop-out rates in Portugal are broadly in line with the OECD average, but Portugal stands out slightly compared to other OECD member countries in the share of students who drop out after the first year, rather than during their first year. Data from Portugal indicate that most of the variation in completion rates by field of study appears after the first year.

Challenges related to social and academic integration can appear early but also differ and fluctuate along student careers and between study programmes. Indeed, almost one quarter (24%) of students in Portugal report feeling like they do not belong in higher education.

Several initiatives across Portugal aim to promote the social and academic integration of their students, primarily focusing on first-year students. Most higher education institutions in Portugal provide tutoring and mentoring services to their students to address academic, social and well-being challenges that students experience. These activities have been encouraged by the Programme for Promoting Success and Reducing Drop-out Rates, funded by the EU through via the Recovery and Resilience Plan. As the EU Recovery and Resilience Facility is set to end by 2026, institutions face the challenge of making sure that the best initiative can be maintained.

The national Programme for Promoting Success and Reducing Drop-out Rates has also fuelled a momentum for innovation in integrating advanced analytical tools to anticipate and customise student support at the institutional level. Some institutions are piloting emerging applications of predictive models

in student support systems in Portugal, but challenges remain in identifying best practices and enabling more institutions to benefit from new digital tools.

Policy recommendations

1. Support higher education institutions to continue to provide and improve tutoring and remediation courses for students to develop subject-specific knowledge and transversal skills necessary for higher education programme completion.
2. Support institutions to strengthen their offering of mentoring and well-being programmes that have been shown to be effective in promoting student success.
3. Harmonise institutional-level collection and use of data on progress, drop-out and successful completion rates across programmes and higher education institutions, with the longer-term aim of consolidating the selection of active tracking models and rolling out good practice, along with identifying an alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.
4. Encourage the sharing of dedicated IT services across institutions in order to support institutions to develop and maintain their tracking tools, while reducing the duplication of work across institutions.

6.2. Higher education institutions have increasingly provided tutoring and mentoring services to their students to promote completion rates

Many interlinked factors are relevant to understand why students drop out. International research has shown that factors like student characteristics and background, as well as their social and academic integration, the content and delivery of courses, and labour market conditions can be influential (Aina et al., 2022[4]). In Portugal, students are slightly more likely to drop out after the first year than during it, and there is considerable variation across courses. At the same time, a relatively large proportion of students feel that they do not belong in higher education. It is therefore promising that the government has funded a range of initiatives to support the academic and social integration of students through tutoring and mentoring.

6.2.1. When students drop out of higher education in Portugal, it can be a relatively long time after first enrolling

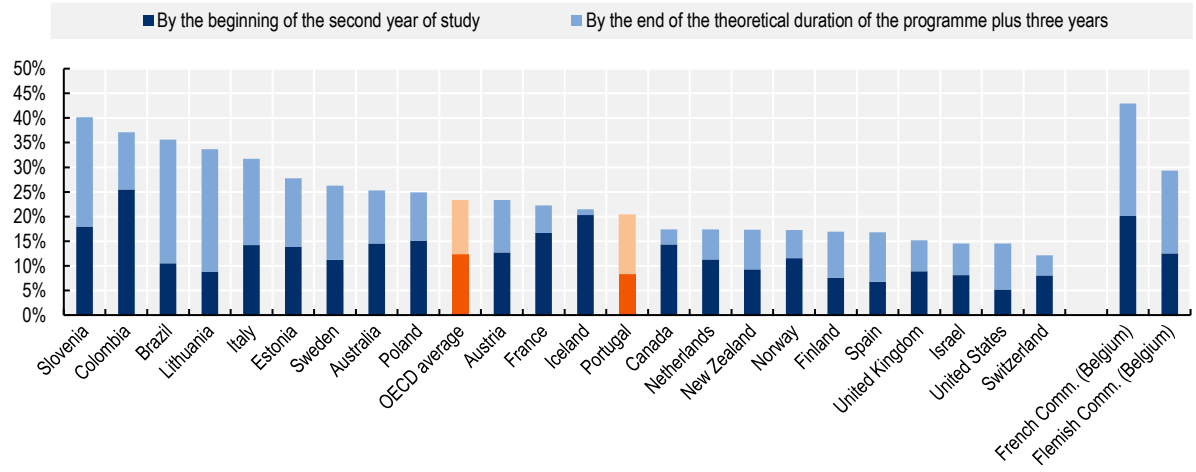
In Portugal, the drop-out rate after the first year of study is slightly lower than the average across other OECD jurisdictions for which data exist. Just 8% of full-time bachelor's students were reported as no longer enrolled in tertiary education at the beginning of the second year in Portugal, compared to 12% on average across the OECD countries for which true cohort data ending in 2020 are available. The drop-out rate after the first year of studies was slightly higher in Portugal than its European neighbour Spain (7%) and on a par with that in Finland (8%) and Switzerland (8%) (Figure 6.1).

In the first year, students have a chance to find out whether the programme and institution they have chosen suits them. Before arriving in higher education, students often lack complete information about their chosen study programme, including the difficulty of courses, the effort needed to succeed, their fit with the academic environment and whether the career prospects associated with their chosen course align with their goals. On arrival, students may re-assess their initial decision to enrol in a particular programme or in higher education at all. Similarly, it is important for students to enjoy their subject area of study and to feel that their experiences during their studies correspond adequately with the expectations they had before applying. In support of this, Ferrão and Almeida (2018[5]) find that students in Portugal who enrol in a field of study that is not their first preference are more likely to leave in the first year of the programme.

Drop-out rates after the first year of study in Portugal remain higher than in peer countries. The proportion of students who drop out after the first year of studies, but before the theoretical duration of the programme plus three years in Portugal is higher than the drop-out rate in the first year, at 12%. This is similar to the average across OECD jurisdictions (11%), Austria (11%) and Colombia (12%), but higher than in Finland (9%) and Switzerland (4%) (Figure 6.1).

Figure 6.1. When students drop out in Portugal, it is often a relatively long time after first enrolling

Share of full-time bachelor's students no longer enrolled in tertiary education, by timeframe after entry, true cohort data only (2020)



Notes: See Education at a Glance, 2022. Students who repeat or transfer to a different course/level/programme type/mode of study are also treated as having progressed. Note that the year of reference for the data (2020) corresponds to a period three years after the theoretical end of the programme (2017). The reference year for students' entry to study may differ depending on the duration of their programme.
Source: OECD (2022[6]), Table B5.2, Education at a Glance.

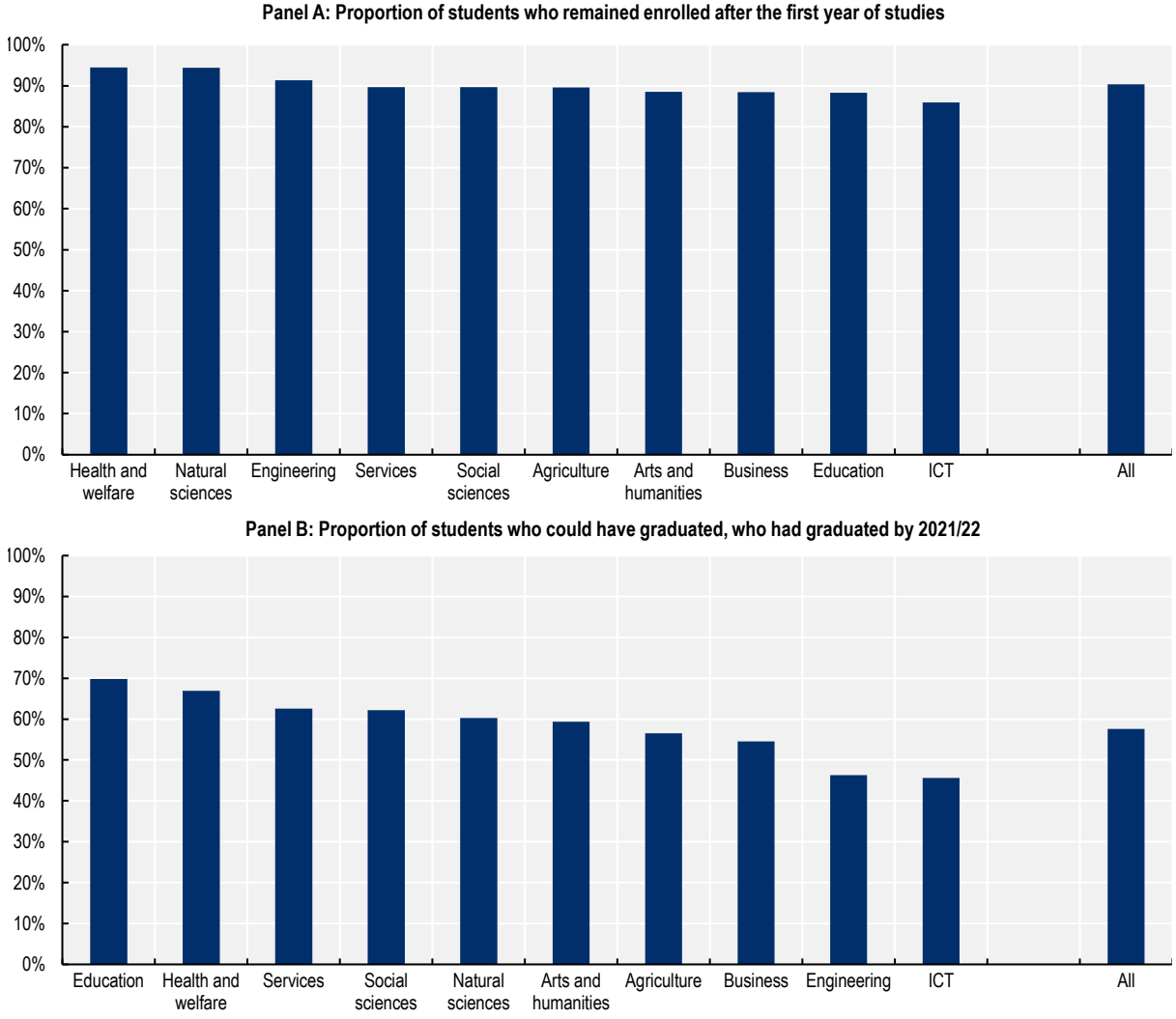
Academic challenges can differ along student careers and between study programmes

The previous section highlights that it is relevant to consider progression rates after the first year and later in student careers, even though much attention tends to be given to first-year drop-out rates. Over the course of students' careers, there tend to be some critical elements that are required in order to complete a degree, such as particularly challenging exams or assignments. Identifying these elements and monitoring student success at these key moments in each academic year can help student support teams to pre-emptively address challenges. Therefore, support needs may be different depending on the stage of students' progress through higher education programmes.

Data from Portugal also indicate that while completion rates differ somewhat across subjects in the first year of study, it is only in subsequent years that these differences become more pronounced (Figure 6.2). This may indicate that there are similarities across fields of study in the first year of study that support students' initial integration processes. Subsequently, factors that differ across programmes, like contact with academic staff, the academic content itself and the organisation of programmes, may become more important.

Figure 6.2. Most of the variation in completion rate by subject area appears after the first year in Portugal

Proportion of students remained enrolled in their programme after the first year of studies (Panel A) and the proportion of students who could have graduated who had graduated by 2021/22 by the theoretical duration of the programme plus one year of a typical bachelor's programme (Panel B), by higher education programme (2018 cohort)



Note: Completion rates refer to the percentage of student entrants in 2018/19 who theoretically could have finished their programmes in 2021/22 (theoretical duration plus one year for a bachelor's degree). The chart includes shortened study areas. The fully study area definitions are: Education; Health and welfare; Services; Social sciences, journalism and information; Natural sciences, mathematics and statistics; Arts and Humanities; Agriculture, forestry, fisheries and veterinary; Business, administration and law; Engineering, manufacturing and construction; Information and Communication Technologies.
Source: Bespoke tables from DGEEC, Prosseguimento de estudos no Ensino Superior 2015/2016 a 2021/2022.

There may also be differences in labour market returns to a completed degree compared to a partially completed degree. In certain fields – such as education, health and welfare – the labour market tends to rely on credentials rather than demonstrated skills, which would require students to graduate to be able to find a job in their field of studies. By comparison, in information and communication technologies, the labour market tends to value demonstrated skills. Thus, if students have acquired the necessary skillset, they may receive

good job offers before completing their studies, raising the opportunity cost and lowering the expected marginal return of completing the programmes they enrolled in.

Social integration and good mental health can help students perform at their best

Looking beyond academic achievement, students' sense of social integration, sense of belonging and mental health, can be key factors in student success (Zając et al., 2024[7]; Müller and Klein, 2023[8]). Stress and mental health issues, including emotional and mental burnout, can be major challenges for higher education students and negatively impact both their health and academic performance (Lipson and Eisenberg, 2018[9]; Wyatt and Oswalt, 2013[10]; Zając et al., 2024[7]; Turan et al., 2023[11]; Gómez-García et al., 2022[12]). High psychological distress has been associated with increased test anxiety, lower self-efficacy, poor time management and limited use of study resources (Brackney and Karabenick, 1995[13]).

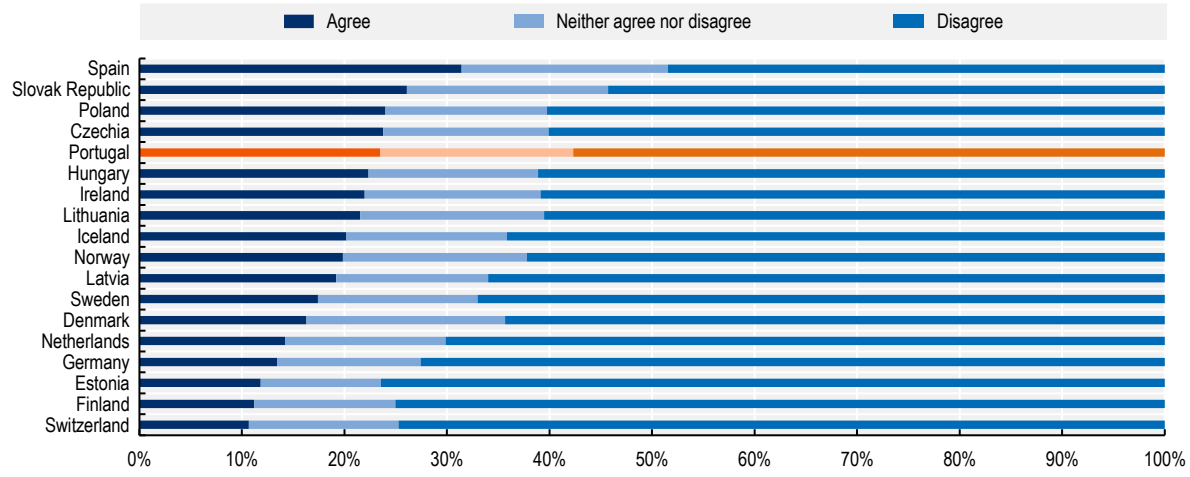
Research by Casanova et al. (2021[14]) from Portugal finds that academic exhaustion is negatively correlated with satisfaction with education and positively correlated with intention to drop out. The authors also find that the intention to drop out was in turn negatively correlated with satisfaction with education. The authors highlight that these findings reflect a dynamic and continuous process of adjustment and persistence, where students struggling to manage challenges and adversity could experience lower levels of self-efficacy and more feelings of isolation and stress, affecting their well-being (Casanova et al., 2021[14]).

Issues related to mental health likely became even more pronounced during the challenging periods of self-isolation and social distancing enforced by many governments to combat the spread of COVID-19, including lockdowns, shutdown of student dormitories, social distancing, and online learning (Abraham et al., 2024[15]).

Participants in focus groups held within the scope of this project report that some students worry about whether higher education is "for them". While many battle with fears of not fitting in, it may be especially challenging for students whose friends and family have not attended higher education. According to Eurostudent data, around one-in-four students (24%) in Portugal report totally agreeing or agreeing that they often have a feeling that they do not really belong in higher education (Figure 6.3). This proportion is in line with that in Czechia (24%), but higher than in countries like Germany (13%) and Finland (11%) (Eurostudent, 2024[16]). It is therefore promising that Portugal has invested in increased mentoring support in institutions across the country.

Figure 6.3. Almost one-in-four students in Portugal report feeling like they do not belong in higher education

Share of students agreeing or disagreeing with the statement "I often have the feeling that I don't really belong in higher education", 2024



Note: The surveys were conducted over the time period 2020-2024. Data refer to 2023 in Spain, Portugal; 2022 in Czechia, Denmark, Estonia, Finland, Hungary, Ireland, Iceland, Lithuania, Latvia, the Netherlands, Norway, Poland, Sweden, Slovak Republic; 2021 in Germany, and 2020 in Switzerland.
Source: Eurostudent, (2024[16]), The eighth Eurostudent round (2021-2024).

6.2.2. National funding has encouraged institutions to keep investing in initiatives that aim to reduce higher education drop-out

Higher education institutions in Portugal have several interlinked policies and initiatives in place to support student success, which build on pre-existing initiatives by institutions to promote retention and stimulate the development of new programmes. The national Programme for Promoting Success and Reducing Drop-out Rates in Higher Education in Portugal has stimulated the development and strengthening of initiatives to support students (Box 6.1). The programme funding has been allocated to initiatives in four key general programme areas: welcome and integration programmes for new students; mentoring and tutoring activities for well-being and academic success; the use of digital tools (developing methods for monitoring student success and drop-out risk); and initiatives to promote pedagogical innovation, including teacher training sessions.

There is now a range of ongoing initiatives to provide tutoring and mentoring at higher education institutions in Portugal, delivered primarily via the social support teams within the institutions' Social Action Services (Serviços de Ação Social, SAS) in collaboration with teaching staff. Most higher education institutions in Portugal have implemented welcome and integration initiatives led by alumni and staff (that go beyond the traditional but controversial integration activities involved in the student-led "praxe" initiations for first-year students), as well as peer-mentoring programmes for their first-year students.

High-quality tutoring to support students struggling to complete higher education programmes

International evidence from several countries suggests that prior achievement is a key predictor of first-year success in higher education, for instance in Estonia (Silva et al., 2022[17]), Italy (Aina, 2011[18]), and Germany (Danilowicz-Gösele et al., 2017[19]). To help incoming student cohorts with variations in their academic and practical preparedness, many institutions in Portugal have invested in peer- and staff-led academic support

and tutoring, delivered through the institutional social support teams. The development of further support programmes has been encouraged by the national "Programme for Promoting Success and Reducing Drop-out Rates in Higher Education in Portugal". Given the plurality and diversity of active programmes, there is a unique opportunity in Portugal to draw lessons from the initiatives that have worked.

Tutoring programmes target current students and aim to support the development of study skills and subject-specific knowledge (Mateus, 2023[20]). For instance, the Polytechnic Institute of Viana do Castelo has implemented the programme "Contigo" ("With you"), which includes tutoring with a student-centred focus. The tutoring promotes both study skills via the Study Skills Development Programme and online courses and e-books for subject-specific knowledge in physics and mathematics. The activities include tutorials, mediation, training in transversal skills, as well as participation in projects and networks. The institution also provides monitoring reports on these activities.

Mentoring programmes in higher education promote student well-being and sense of belonging

Most social support teams in higher education institutions in Portugal also run programmes to support student success through peer mentoring. Peer-mentoring programmes typically involve older student volunteers who take part in more informal activities with first-year students, for example showing them around campus and attending workshops together. Programmes tend to be run under the guidance and supervision of staff members and sometimes involve training and some incentives for student volunteer mentors (Mateus, 2023[20]). For example, the University of Porto has constructed a new portal for peer-mentoring activities within the scope of the Programme for Promoting Success and Reducing Drop-out Rates in Higher Education in Portugal, "Mentoria U.Porto". The scheme produced guides and training references that are accessible via a dedicated portal. Going forward, the University of Porto aims to target integration initiatives especially to students who live independently by providing workshops on cooking, managing personal finances and other essential skills of managing an independent household.

Box 6.1. Programme for Promoting Success and Reducing Drop-out Rates

The Programme for Promoting Success and Reducing Drop-out Rates (Programa de Promoção de Sucesso e Redução de Abandono) is a multi-year national programme that provides funding to support the implementation of initiatives in higher education institutions that support student completion rates. Higher education institutions apply for funding for specific initiatives and selection decisions are made by an evaluation panel.

Funding comes from the Human Capital Operational Programme (POCH) (from the European Social Fund (ESF)) for convergence areas, the Portuguese State Budget, and the More Digital Impulse Programme, funded by the EU Recovery and Resilience Plan (RRP) (Government of Portugal, 2024[21]; Diário da República, 2024[22]). Funding is granted to initiatives that explicitly address the dual aim of raising preparedness and improving academic skills, including peer-mentoring schemes. The scheme specifically targets students enrolled in higher education for the first time in their first year.

The programme has been implemented in three phases. The first phase of the programme is funded by the Human Capital Operational Programme for institutions in the convergence regions. A total of EUR 6.6 million has been allocated to projects in 24 higher education institutions. The second phase of the programme is funded by the State Budget. It supports 20 projects in institutions located in the regions of Lisbon, Algarve, Azores, and Madeira to the total amount of EUR 3.7 million (Government of Portugal, 2024[21]; Diário da República, 2024[22]).

In the third phase, an additional EUR 20 million are also planned to finance the Programme through investment in the programme More Digital Impulse, funded by the RRP. An objective for the investment in the More Digital Impulse Programme is to modernise pedagogical practices in higher education, with a view to promoting academic success, reducing drop-out rates and student well-being. Out of the EUR 20 million, four million are earmarked for the design or purchase of IT systems for predicting school drop-out risk (Government of Portugal, 2024[21]; Diário da República, 2024[22]).

There have been some initial efforts to draw lessons from ongoing initiatives

There is value in encouraging a plurality of approaches among higher education institutions, at least in an initial phase of development, since it allows institutions greater freedom to experiment with different initiatives and methods compared to a situation where there were strict guidelines to follow in place.

However, given that projects are largely funded with resources from temporary EU funding programmes, there are important questions about the possibilities to ensure that successful initiatives remain in place in the longer term. If it is deemed that there will be a need for consolidating projects and streamlining budgetary commitments in the medium term, it is essential to understand the success of individual programmes, and whether there are ways to cut costs in line with smaller budgets. Cross-institutional collaborations could be useful to streamline practices and minimise costs and roll out best practice to ensure equity in support across institutions. It is therefore in the interest of institutions to ensure that the pilot initiatives are thoroughly evaluated, and that evaluations are shared and understood in order to scale up good practice.

There have already been some efforts to draw lessons from institutions' experiences. For example, throughout the Programme for Promoting Success and Reducing Drop-out Rates in Higher Education in Portugal, participating institutions have met during conferences to share information about their initiatives and their implementation process. Previously, an extensive review of ongoing initiatives was undertaken by Mateus (2023[20]). The Portuguese Foundation for Science and Technology (2015[23]) went further in that they aimed both to take stock of activities and also identify best practices for welcoming first-year students to higher education. The report finds evidence that welcome programmes are used by higher education institutions, and that many survey respondents participate in these activities and many report finding some activities helpful for their academic experience (Portuguese Foundation for Science and Technology, 2015[23]).

Further efforts to draw lessons from existing experience could be made. This could help to support institutions to improve their offering of remediation courses for students to develop subject-specific knowledge and transversal skills and to strengthen their offer of mentoring and well-being programmes that have been shown to be effective in promoting student success by adopting good practice when the EU's Recovery and Resilience Facility ends in 2026.

Given the development of new initiatives and the end of the present round of funding, there may be scope for collating information on what has worked so far. Since these initiatives are institution-based, the first step could be to ensure that institutions conduct evaluations of their programmes and that they produce information about initiatives and findings from evaluations. It is therefore promising that many institutions in Portugal are reportedly already conducting evaluations of their programmes, although these are yet to be shared. Further inspiration could also be drawn from international examples of designing and delivering programmes with a clear evaluation strategy. For example, the EU-funded ENTRANTS project, delivered in Austria, Belgium, Germany and the United Kingdom between 2020 and 2023 took an approach that built in the possibility for evaluations by including the dissemination of a baseline survey to assess student needs and a self-assessment of overall resilience before delivering programmes aimed to improve the social integration of new student cohorts (European Commission, 2023[24]) (Box 6.2).

A national review could collect information about the existing programmes and analyse the results. Keeping in mind that the dissemination of this information among stakeholders is key, it could be useful to build an "Evidence Hub" that could be accessible online. The national review could also help identify good practice and play a role in drafting guidelines and requirements for future funding for tutoring programmes, while also ensuring that evaluations keep a good-practice standard, for example playing a role like TASO in the United Kingdom (TASO[25]) (Box 6.2). In Portugal, it is possible that the newly formed National Council for Pedagogical Innovation in Higher Education (*Conselho Nacional para a Inovação Pedagógica no Ensino Superior*, CNIPES) could play a role in the co-ordination and dissemination of evaluations, and the development and refinement of best practice (DGES, 2025[26]).

Box 6.2. Evaluating institutional initiatives across the EU and in the United Kingdom

The **EU-funded ENTRANTS project**, delivered in the United Kingdom, Belgium, Austria and Germany between 2020 and 2023 focused on helping new higher education cohorts adapt to student life. The project targeted first-year students who encounter entry-level difficulties and mismatches between expectations and reality. The aim was to address these challenges before they become overwhelming and result in students dropping out. The project involved several activities, including disseminating a survey to assess student needs, delivering an online student experience platform which included a self-assessment of overall resilience, an obligatory community building course incorporating strength assessments and escape games to foster exchange, and staff training for academic and non-academic staff (European Commission, 2023[24]).

Transforming access and outcomes for students (TASO), in the United Kingdom, is an independent hub for the higher education sector founded in 2019 through a consortium of universities and the Behavioural Insights Team. An independent charity since 2021, it is publicly funded by the Office for Students and an affiliate of the What Works Centre, which is part of the United Kingdom Government's What Works Movement that aims to drive evidence-based policy development by conducting evaluations and working with the sector to support and advice institutions to conduct their own evaluations. TASO provides evidence and resources to help ensure that everyone has the opportunity to access, succeed and thrive in higher education. Through the newly launched Higher Education Evaluation Library (HEEL), TASO aims to help in the dissemination of best practice by bringing together evaluations on access, participation, and student success interventions (TASO[25]).

Policy recommendations

Key finding:

Most higher education institutions in Portugal have used short-term funding from the EU's Recovery and Resilience Facility (RRF) funding to increase the offer of tutoring and mentoring services to their students, but it is unclear whether these programmes will continue as the funding stream ends. Questions remain on which initiatives work well and warrant scaling up, which risks limiting the potential of these initiatives to promote student completion rates widely.

Recommendations:

1. Support institutions to improve remediation courses for students to develop subject-specific knowledge and transversal skills necessary for higher education programme completion by adopting good practice, identifying alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.
2. Support institutions to strengthen their offer of mentoring and well-being programmes that have been shown to be effective in promoting student success, identifying alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.

6.3. Innovations in using analytical methods to design student support interventions are gaining momentum

Academic researchers in Portugal have started to investigate the possibilities of using student tracking analytics to detect the risk of drop-out, and recent investment through the national Programme for Promoting Success and Reducing Drop-out Rates in Higher Education has spurred institutions to start applying findings from the research community in practice. This section reviews recent developments in the field in Portugal.

Before moving on to discuss the application of predictive models to promote student success, it is important to highlight that, although tracking systems can add to the toolbox of social support teams in higher education institutions to help identify students in need of support and personalise the kind of support offered, no such predictive system is fully accurate in all possible cases, as explored in detail in the accompanying student tracking report delivered to the Portuguese authorities as part of this project. They therefore work best as a complement to traditional support services, which should remain available to students who seek help through traditional means.

6.3.1. Institutions and researchers in Portugal have started leveraging detailed data to understand student success

Higher education institutions are increasingly implementing new ways to understand the reasons why certain students drop out, and what can be done to address their individual needs and support completion. Across OECD member countries, academic researchers and higher education institutions are working to develop predictive models to improve the understanding of student completion patterns and to support targeted interventions. This research has particularly benefited from the increased availability of data in education settings, not least institution-level data, to develop broader applications, including identifying students who are at risk of dropping out of study programmes (Sclater Niall, 2014[27]).

Institutions in Portugal have access to the detailed data required for predicting whether individual students are at risk of dropping out

Portugal is in a good position to develop targeted, data-led student support systems since higher education institutions can leverage the datasets already in use for providing services and administrative functions. These rich and nuanced administrative data help enable the development of prediction models capable of accurately identifying subsets of students at risk. The main data sources are detailed below (see also de Oliveira et al (2021[28])).

Information about incoming students

Attributes such as secondary education leaving grades, age, and other demographic factors provide immediate predictors for a general assessment of the risk of dropping out. These can then be integrated with academic performance measures from higher education to adapt to students' study trajectories over time. Information about background and socio-economic factors is collected upon enrolment in Portugal and serves as a foundation for providing initial feedback on student risk of dropping out, which can be used by social support teams or academic staff. While it can be useful for predicting both early academic success and the risk of drop out, this information is static and does not evolve with a student's career trajectory.

Higher education course performance

Students' progress in successfully passing study credits offers reliable predictive power regarding drop-out rates and exam success. It acts as a real-time indicator for ongoing proficiency monitoring, adapting to each student's behaviour and providing insights into their specific engagement with their study programme. Subjective information, like post-matriculation follow up surveys about students' social and academic engagement, and mental health conditions, can complete the data. Real-time data, such as logs from access to online services, can also serve as a valuable resource for identifying at-risk behaviours during teaching sessions.

Records of successful graduates

Datasets using records of successful graduates can illustrate how incoming and current students align with profiles that achieved study success in the past. It helps identify potential graduation challenges, such as differences in background, study habits, and proficiency levels, as well as key challenging elements, such as certain exams.

Academics in Portugal have been experimenting with different models of understanding student drop out and predicting student success

The understanding of learning analytics within academia has expanded significantly over time (Prieto et al., 2019[29]), and models used by academics internationally now incorporate a range of methodologies, such as descriptive, predictive and prescriptive analytics (Berland, Baker and Blikstein, 2014[30]). Academics and institutions in Portugal have been experimenting with different models to understand the factors that are important in student drop out, and to predict the chance of student success.

For example, a study from the University of Porto focuses on understanding the key factors that are the most important in predicting student success. The authors use institution-level data from enrolments between 2012 to 2019 and a relatively large sample of 50 000 students from the University of Porto. The study finds that the top five attributes that were the best at predicting drop-out risk were the number of delayed courses, percentage of programme completion, number of courses already enrolled, number of delayed years and number of ECTS credits to which the student has committed for the current semester (Belokurows, 2021[31]).

Many studies to date focus on predicting the study success of individual students. For example, a Portuguese study on students who transfer courses, also at the University of Porto, uses static data on their incoming cohort to estimates the length of time students are expected to take to complete their degree. The authors use information about prior achievement by considering the selectivity of the previous programme and machine learning models to obtain estimates of the time to degree (Pêgo, Miguéis and Soeiro, 2024[32]).

Several studies use institution-level data to identify the machine learning techniques that can identify students at risk of dropping out with the highest accuracy. Examples of research teams developing predictive models include a Portuguese study based on a sample of 2 934 students from the University of Évora. The researchers propose a method to identify the drop-out risk of students based on academic performance. The model exploits student academic record data from four different programmes, includes a wide range of institution-level information and evaluates four different machine learning techniques. They find that the best model reaches an accuracy of around 96% when distinguishing between students at risk of dropping out and students not at risk of dropping out (Prite, Gonçalves and Rato, 2020[33]).

6.3.2. Emerging applications of predictive models to promote student success in Portugal

Building on the academic research on identifying the chances of student success and the risk of drop out, efforts are increasingly being made to apply the findings in the implementation of student support systems. Several institutions in Portugal are in the process of piloting integrated analytical tools in their support activities to promote student success, drawing on the funding from the national Programme for Promoting Success and Reducing Drop-out Rates in Higher Education.

Analytical models can help identify students who may benefit from better integration in academic or social life and address these issues through traditional interventions tailored to the nature of the difficulties and the type of at-risk student, such as tutoring, mentoring and psychological support. Interventions based on findings from the models could be tailored to individual needs and identified in at least three key phases of student trajectories: a) at the time of enrolment and during the first term; b) after the first term and within the first academic year; and c) at year-end in all years following the first. It is possible to implement individual support policies to reduce drop-out rates based on critical elements in each phase, considering the available financial resources and human capital at each higher education institution.

In Portugal, there have been at least three different forms of applications of advanced analytics in institutions so far: integration of findings into traditional support activities; integration of findings into virtual support activities; and integration of findings into evaluations of support activities.

Integration of findings from analytical models into traditional (human-based) support activities

Based on findings from a risk assessment, students may be personally invited to participate in the existing offer of counselling, mentoring, and/or tutoring activities, depending on the identified needs. These may include targeted courses to address specific knowledge gaps, mentoring activities with students enrolled in subsequent years, and counselling services aimed at promoting engagement and social and academic integration.

For example, the Polytechnic Institute of Bragança has developed a system of monitoring student success using an online platform that includes both descriptive statistical elements and an analysis of predicted risk of dropping out which uses machine learning tools that generate real-time feedback for immediate action. Students who are flagged by the algorithm as being at risk of dropping out have access to a dedicated telephone-based support. Student profiles that are identified as needing pedagogical support also receive targeted support from teachers and students in the curricular units that have been identified as challenging. Such targeted tutoring is available in all areas of basic training, including mathematics, physics, chemistry, biology and Portuguese and is complemented by online courses in certain subjects (mathematics, chemistry and biology) (Pacheco, 2024[34]).

Similarly, the Polytechnic Institute of Portalegre links information from different data sources including demographic, socio-economic, macro-economic, and academic data on enrolment, and academic performance at the end of the first and second terms. The dataset is used to build machine learning models for predicting academic performance and drop-out risk (Cabezuelo et al., 2022[35]). The models are integrated into a Learning Analytic tool that is applied to students enrolled for the first time and provides information to the tutoring team and is used as a tool to help select incoming students invited to participate as mentees in mentoring activities. The institution foresees a continual development of the models, with annual updates and validation either with the new information of incoming students or with the information of the final situation of the already enrolled students (Martins et al., 2023[36]).

Integration of findings from analytical models into virtual support activities

Risk assessments using analytical models can also help direct students to targeted online or virtual support. This could allow some of the students who would have contacted the staff to find the help they need more quickly. This way, staff support teams can spend more time working with the students who need more complex forms of support. This idea of sharing the case load between the staff and online tools can help make the existing support offer more targeted and efficient.

For example, the University of Coimbra has implemented and tested a solution of adaptive learning and virtual tutoring using a chatbot (Albuquerque, 2024[37]). Similarly, the private university Autonomous University of Lisbon (UAL) platform will integrate a chatbot including a virtual tutoring solution that uses natural language processing and artificial intelligence. Through this system, students who are flagged as being at risk of dropping out will be issued with either mentoring to support students who lack psychological guidance or tutoring to students who need support in technical-scientific learning (Donário, 2024[38]).

Integration of findings from analytical models into evaluations of support activities

The higher the quality of the services and facilities available to students, the more effective the results of drop-out prevention efforts will be. Monitoring the individuals involved in these activities can be useful for measuring the effectiveness of the implemented measures, particularly regarding those who, despite being identified as at risk, did not participate. Evaluation can be readily conducted by analysing the outcomes achieved at the end of the first examination session.

For example, Nova University of Lisbon has also developed systems that identify students at risk of dropping out using predictive elements in the analysis of data on academic, personal, socio-economic and behavioural factors, partly with the aim to inform holistic policy development (Henriques and Xufre, 2024[39]). In a similar vein, the platform for monitoring student success and predicting risks of dropping out developed by UAL is foreseen as a tool to measure the impact of actions taken to address elevated drop-out risks in students by estimating the effects from adopting different responses. As such, it can help identify interventions with the highest effects (Donário, 2024[38]).

6.3.3. Scaling up successful initiatives related to student progress and success in Portugal

A predictive model could be built upon a core set of common features while remaining adaptable to specific static and dynamic information relevant to individual study programmes. There are therefore opportunities to scale up successful pilots across multiple institutions. As expected during a piloting phase, there are currently considerable differences in the development and use of advanced analytical models across institutions in Portugal. This suggests that now is a good time for cross-institutional learning and sharing of knowledge, models and applications.

While this chapter mentions a few studies and initiatives drawing on published papers and presentations made by institutions as part of the Programme for Promoting Success and Reducing Drop-out Rates in

Higher Education in the event series "*Sucesso académico e prevenção do abandono no ensino superior*", there has seemingly not (yet) been a systematic collection of evidence on institution-based initiatives undertaken in this field, nor of evaluations of these initiatives.

While it is valuable to fund a number of institution-based initiatives in a relatively new policy field to stimulate innovation, the long-term value of innovation hinges on the ability to harness results and identify good practice that can be rolled out widely. A long-term aim could therefore be to consolidate the selection of active tracking models and encourage the adoption of good practice when the EU's Recovery and Resilience Facility ends in 2026.

To this aim, information from ongoing pilot initiatives would need to be shared to understand what works what policies could be adopted across institutions. This would be important for institutions that have not yet implemented a student tracking system. These institutions could learn from others and, for example, harmonise institutional-level data collection and use on progress, drop-out and successful completion across programmes and higher education institutions in order to better be able to adopt existing tracking models. Such a harmonised use of tracking models could enhance the overall cost-efficiency at the national level and help ensure equity of access to digital tools across institutions.

While institutions are already able to spontaneously collaborate in this field, for example by the use of the forums created by the higher education consortia and the centres of excellence in pedagogical innovation, it appears that cross-institutional sharing of good practice is limited. As the funding for the Programme for Promoting Success and Reducing Drop-out Rates in Higher Education is due to end, the Ministry convened the National Council for Pedagogical Innovation in Higher Education (CNIPES) in 2024. As an independent consultative body on matters of pedagogical innovation and training, it could play a role in the co-ordination of a stocktaking exercise of initiatives and collection of results from evaluations (DGES, 2025[26]). It is also possible that Portugal's National Research and Education Network, FCCN, as well as private digital services providers have roles to play in the scaling up of successful initiatives. International examples of where governments have played a role in simplifying the procurement of digital services in the education sector, including in Ireland and the Netherlands (Box 6.3).

Box 6.3. Sharing IT services across institutions in the Netherlands and Ireland

The SURF organisation in the Netherlands is an IT co-operative that connects institutions and promotes a collaborative organisation for network and computer services in education and research. It runs a host of ICT services, including identity and access management, procurement and delivery of IT services and content, online security and network and connectivity services. SURF helps its members to deliver ICT and data solutions by managing software licencing, content services and tenders on behalf of its members. It is also a meeting place where members work together on innovative solutions in a range of ICT areas such as cybersecurity, study data and artificial intelligence (SURF[40]).

Ireland offers an example of how to facilitate the procurement of digital services from the private market. Given the autonomy afforded to educational institutions in Ireland, procurement of digital educational tools and resources can be performed directly by the central government, by education and training boards managing multiple schools, or by schools themselves. Procurement processes for the government are performed through the Office of Government Procurement (OGP), a division under the Department of Public Expenditure and Reform. Framework contracts negotiated by the OGP, by the Department of Education, and by the Higher Education Authority Network (HEAnet) are in place with ICT equipment suppliers, resulting in an approved selection of suppliers that are recommended for schools to procure. In addition, schools and boards can profit from brokerage services in order to negotiate prices with suppliers available by partnering with organisations with expertise on the ICT procurement market and processes such as the government funded HEAnet. Furthermore, the Department of Education has also established single provider framework contracts to provide schools with a variety of ICT equipment (OECD, 2023[41]).

To facilitate the adoption of good practice, there could be benefits in encouraging the sharing of dedicated IT services across institutions in order to support institutions to develop and maintain their tracking systems, while reducing the duplication of work. This will likely be essential as the funding available for such initiatives risk shrinking significantly by 2026 when the EU's Recovery and Resilience Facility ends. Institutions may benefit from opportunities to harmonise data collection on progress and exit across institutions, particularly as institutions may be in the process of investing in their data infrastructure and governance processes. This could contribute to facilitating the sharing of models and systems across institutions.

Many countries are working towards streamlining and centralising data to facilitate data linking and research access and creating infrastructures that ensure the protection of personal data. This can help cutting-edge innovation and also facilitate the implementation of systems and models across institutions, including those with fewer resources to develop tools internally. For example, Ireland has developed a data plan for equity that encourages the harnessing of new opportunities to link data from different sources. Elsewhere – including in Finland and Lithuania – the government has acted on these opportunities to invest in data infrastructure and management systems that aim to support data-driven research and policy implementation in educational institutions (Box 6.4)

Box 6.4. Harmonising data collection and streamlining data access in Ireland, Finland and Lithuania

The **Data Plan for Equity of Access to Higher Education in Ireland**, developed by Trutz Haase and Jonathan Pratschke, aims to improve the capacity of the Higher Education Authority (HEA) to measure and monitor equity of access. The data plan exploits the possibilities created by new technologies and administrative databases and expanded the scope for research on educational inequalities in Ireland. It relies on linking and geocoding datasets, whereby information from different sources is brought together either at the level of the individual or for Small Areas of residence (Haase and Pratschke, 2017[42]). Building on this, the HEA has committed to further closing data gaps by developing a new Data Plan in their Strategic Action Plan for Equity of Access, Participation and Success in Higher Education 2022-28 (HEA, 2022[43]).

For instance, the Research Information Hub is a national service of the **Finnish Ministry of Education and Culture** that gathers and shares information on scientific research carried out in Finland in an easily accessible way and format. The Research Information Hub includes the Virta higher education achievement register, launched in the early 2010s and developed from the study information systems of Finnish higher education institutions. The development of the Virta register created a natural platform for harmonising and improving the quality of data in higher education study information systems and has several additional purposes. The Virta register handles several data transfers to authorities and other actors that higher education institutions are obliged to carry out and allows the Ministry of Education and Culture the flexibility to produce a variety of statistics on higher education. It is also used for student selection in higher education institutions, where, from 2014 onwards, applicants could be allocated to quotas according to whether they had a previous higher education entrance qualification (Haapamäki, 2024[44]).

In **Lithuania**, the central government's student information system, *ŠVIS* (*Švietimo Valdymo Informacinė*), is the cornerstone of the public digital infrastructure for system management. Although *ŠVIS* is built from *IBM Cognus*, a commercial tool, it is publicly owned by the government and the data are stored on the ministry's servers. *ŠVIS* exchanges data with databases from the student register system that contain statistical information related to all levels of education, including higher education, with data about schools, teachers, and students, but can also be linked with data from other central registers, including the health system register and the social insurance system register. Teacher and student data are pseudonymised: individuals are linked to their national personal ID number, which is unique, longitudinal, and confidential, but different from their personal educational ID. The system stores students' standardised assessment results, as well as teacher-given grades in upper secondary education and VET (from non-standardised exams). *ŠVIS* is updated in real time so that authorised users, be they administrators, school principals, or teachers, have access to analytics dashboards quickly after the information is collected (OECD, 2023[41]).

Policy recommendations

Key finding:

The EU's Recovery and Resilience Facility (RRF) funding has fuelled a growing momentum for innovation in integrating advanced analytical tools to anticipate and customise improve student support at the institutional level, but challenges remain in identifying best practices and enabling more institutions to benefit from new digital tools, in order to capitalise on the ongoing innovation to promote completion rates.

Recommendations:

3. Harmonise the collection and use of data on progress, drop-out, and successful completion rates across programmes and higher education institutions at an institutional level, with the longer-term aim of consolidating the selection of active tracking models and encouraging the adoption of good practice, along with identifying alternative funding source when the EU's Recovery and Resilience Facility ends in 2026.
4. Encourage the sharing of dedicated IT services across institutions in order to support institutions to develop and maintain their tracking tools, while reducing the duplication of work.

References

Abraham, A. et al. (2024), "Burnout increased among university students during the COVID-19 pandemic: a systematic review and meta-analysis", *Scientific Reports*, Vol. 14/1, https://doi.org/10.1038/s41598-024-52923-6. [15]

Aina, C. (2011), "The determinants of success and failure of italian university students. Evidence from administrative data", *Rivista Internazionale di Scienze Sociali* 2. [18]

Aina, C. et al. (2022), "The determinants of university dropout: A review of the socio-economic literature", *Socio-Economic Planning Sciences*, Vol. 79, https://doi.org/10.1016/j.seps.2021.101102. [4]

Albuquerque, C. (2024), *ON-BOARD - Programa integrado de tutotia para a prevenção do abandono e insucesso académico*, https://www.dges.gov.pt/pt/noticia/iii-seminario-sucesso-academico-e-prevencao-do-abandono-no-ensino-superior-25-de-marco-2024. [37]

Belokurows, R. (2021), *A Predictive Analysis of Academic Success at Universidade do Porto Orientador*, https://repositorio-aberto.up.pt/bitstream/10216/137753/2/515061.pdf (accessed on 5 February 2025). [31]

Berland, M., R. Baker and P. Blikstein (2014), "Educational Data Mining and Learning Analytics: Applications to Constructionist Research", *Technology, Knowledge and Learning*, Vol. 19/1-2, pp. 205-220, https://doi.org/10.1007/s10758-014-9223-7. [30]

Bound, J. and S. Turner (2011), "Dropouts and Diplomas", https://doi.org/10.1016/B978-0-444-53444-6.00008-0. [1]

Brackney, B. and S. Karabenick (1995), "Psychopathology and Academic Performance: The Role of Motivation and Learning Strategies", *Journal of Counseling Psychology*, Vol. 42/4, pp. 456-465, https://doi.org/10.1037/0022-0167.42.4.456. [13]

Cabezuelo, S. et al. (2022), "Predicting Student Dropout and Academic Success", *Data Mining and Computational Intelligence for E-learning and Education)*, Vol. 7/11, https://doi.org/10.3390/DATA7110146. [35]

Carneiro, P., J. Heckman and E. Vytlacil (2011), "Estimating Marginal Returns to Education", *American Economic Review*, Vol. 101/6, pp. 2754-2781, https://doi.org/10.1257/aer.101.6.2754. [2]

Casanova, J. et al. (2021), "Dimensionality and reliability of a screening instrument for students at-risk of dropping out from Higher Education", *Studies in Educational Evaluation*, Vol. 68, https://doi.org/10.1016/J.STUEDUC.2020.100957. [14]

Danilowicz-Gösele, K. et al. (2017), "Determinants of students' success at university", *Education Economics*, Vol. 25/5, pp. 513-532, https://doi.org/10.1080/09645292.2017.1305329. [19]

de Oliveira, C. et al. (2021), "How Does Learning Analytics Contribute to Prevent Students' Dropout in Higher Education: A Systematic Literature Review", *Big Data and Cognitive Computing*, Vol. 5/4:64, https://doi.org/10.3390/bdcc5040064. [28]

DGES (2025), *MECI Dec.24 | Order No. 15261-H/2024 - Designation of CNIPES members*, https://www.dges.gov.pt/pt/noticia/meci-dez24-despacho-no-15261-h2024-designacao-de-membros-do-conselho-nacional-para-inovacao. [26]

Diário da República (2024), *Despacho n.º 676/2024, de 22 de janeiro*, https://diariodarepublica.pt/dr/detalhe/despacho/676-2024-838325383. [22]

Donário, G. (2024), *Projeto ambição*, https://www.dges.gov.pt/pt/noticia/iii-seminario-sucesso-academico-e-prevencao-do-abandono-no-ensino-superior-25-de-marco-2024. [38]

European Commission (2023), *Enhancing the transition of non-traditional students*, https://erasmus-plus.ec.europa.eu/projects/search/details/2020-1-AT01-KA203-078052. [24]

Eurostudent (2024), *Eurostudent database*, https://database.eurostudent.eu/drm/. [16]

Ferrão, M. and L. Almeida (2018), "Multilevel Modelling of Persistence in Higher Education", *Avaliação e Políticas Públicas em Educação*, Vol. 26/100, pp. 664-683, https://doi.org/10.1590/S0104-40362018002601610. [5]

Giani, M., P. Attewell and D. Walling (2020), "The Value of an Incomplete Degree: Heterogeneity in the Labor Market Benefits of College Non-Completion", *The Journal of Higher Education*, Vol. 91/4, pp. 514-539, https://doi.org/10.1080/00221546.2019.1653122. [45]

Gómez-García, G. et al. (2022), "Impact of COVID-19 on University Students: An Analysis of Its Influence on Psychological and Academic Factors", *International Journal of Environmental Research and Public Health*, Vol. 19/16, p. 10433, https://doi.org/10.3390/ijerph191610433. [12]

Government of Portugal (2024), *10 milhões de euros para reduzir insucesso escolar no Ensino Superior*, https://www.portugal.gov.pt/pt/gc23/comunicacao/noticia?i=10-milhoes-de-euros-para-reduzir-insucesso-escolar-no-ensino-superior. [21]

Gunderson, M. and P. Oreopolous (2020), "Returns to education in developed countries", in *The Economics of Education*, Elsevier, https://doi.org/10.1016/B978-0-12-815391-8.00003-3. [3]

Haapamäki, J. (2024), "Developing Research Information Hub in Finland, a view from the Ministry", *CRIS2024: 16th International Conference on Current Research Information Systems (Vienna, Austria, May 15-17, 2024)*, https://doi.org/10.1016/j.procs.2024.11.044. [44]

Haase, T. and J. Pratschke (2017), *A Data Plan for Equity of Access to Higher Education | Publications | Higher Education Authority*, HEA, https://hea.ie/resources/publications/a-data-plan-for-equity-of-access-to-higher-education/ (accessed on 2 June 2025). [42]

HEA (2022), *National Access Plan: A Strategic Action Plan for Equity of Access, Participation and Success in Higher Education 2022-2028*, https://hea.ie/policy/access-policy/national-access-plan-2022-2028/. [43]

Henriques, R. and P. Xufre (2024), *STEPS@NOVA*, https://www.dges.gov.pt/pt/noticia/iii-seminario-sucesso-academico-e-prevencao-do-abandono-no-ensino-superior-25-de-marco-2024. [39]

Jacobson, L., R. LaLonde and D. G. Sullivan (2005), "Estimating the returns to community college schooling for displaced workers", *Journal of Econometrics*, Vol. 125/1-2, pp. 271-304, https://doi.org/10.1016/j.jeconom.2004.04.010. [46]

Jepsen, C., K. Troske and P. Coomes (2014), "The Labor-Market Returns to Community College Degrees, Diplomas, and Certificates", *Journal of Labor Economics*, Vol. 32/1, pp. 95-121, https://doi.org/10.1086/671809. [47]

Kane, T. and C. Rouse (1999), "The Community College: Educating Students at the Margin Between College and Work", *Journal of Economic Perspectives*, Vol. 13/1, pp. 63-84, https://doi.org/10.1257/jep.13.1.63. [48]

Lipson, S. and D. Eisenberg (2018), "Mental health and academic attitudes and expectations in university populations: results from the healthy minds study", *Journal of Mental Health*, Vol. 27/3, pp. 205-213, https://doi.org/10.1080/09638237.2017.1417567. [9]

Martins, M. et al. (2023), "Multi-Class Phased Prediction of Academic Performance and Dropout in Higher Education", *Applied Sciences*, Vol. 13/8, p. 4702, https://doi.org/10.3390/APP13084702. [36]

Mateus, A. (2023), *Sucesso e Inclusão: Medidas e Iniciativas de Apoio aos estudantes do ensino superior*, DGES. [20]

Müller, L. and D. Klein (2023), "Social Inequality in Dropout from Higher Education in Germany. Towards Combining the Student Integration Model and Rational Choice Theory", *Research in Higher Education*, Vol. 64/2, pp. 300-330, https://doi.org/10.1007/s11162-022-09703-w. [8]

OECD (2023), *OECD Digital Education Outlook 2023: Towards an Effective Digital Education Ecosystem*, OECD Publishing, Paris, https://doi.org/10.1787/c74f03de-en. [41]

OECD (2022), *Education at a Glance 2022: OECD Indicators*, OECD Publishing, Paris, https://doi.org/10.1787/3197152b-en. [6]

Pacheco, M. (2024), *Drop-In@IPB*, https://www.dges.gov.pt/pt/noticia/iii-seminario-sucesso-academico-e-prevencao-do-abandono-no-ensino-superior-25-de-marco-2024. [34]

Pêgo, J., V. Miguéis and A. Soeiro (2024), "Students' complex trajectories: exploring degree change and time to degree", *International Journal of Educational Technology in Higher Education*, Vol. 21/1, pp. 1-29, https://doi.org/10.1186/S41239-024-00438-5/FIGURES/13. [32]

Portuguese Foundation for Science and Technology (2015), *Acolhimento nas Instituições de Ensino Superior Portuguesas*, Fundação para a Ciência e Tecnologia, https://aepq.tecnico.ulisboa.pt/files/sites/22/relatorio-final-fct.pdf. [23]

Prieto, L. et al. (2019), "Orchestrating learning analytics (OrLA): Supporting inter-stakeholder communication about adoption of learning analytics at the classroom level", *Australasian Journal of Educational Technology*, Vol. 35/4, https://doi.org/10.14742/ajet.4314. [29]

Prite, S., T. Gonçalves and L. Rato (2020), "Identifying Risky Dropout Student Profiles using Machine Learning Models", *Proceedings of the 26th Portuguese Conference on Pattern Recognition, RECPAD 2020*, http://hdl.handle.net/10174/33879 (accessed on 5 February 2025). [33]

Schnepf, S. (2015), "University dropouts and labor market success", *IZA World of Labor*, https://doi.org/10.15185/izawol.182. [49]

Sclater Niall (2014), *Code of practice "essential" for learning analytics*, https://analytics.jiscinvolve.org/wp/2014/09/18/code-of-practice-essential-for-learning-analytics/. [27]

Silva, P. et al. (2022), "High School and Exam Scores: Does Their Predictive Validity for Academic Performance Vary with Programme Selectivity?", *SSRN Electronic Journal*, https://doi.org/10.2139/SSRN.4134133. [17]

SURF (n.d.), *SURF*, https://www.surf.nl/en. [40]

TASO (n.d.), *Transforming access and outcomes for students*, https://taso.org.uk/. [25]

Turan, J. et al. (2023), "Global health reciprocal innovation to address mental health and well-being: strategies used and lessons learnt", *BMJ Global Health*, Vol. 8/Suppl 7, p. e013572, https://doi.org/10.1136/bmjgh-2023-013572. [11]

Wyatt, T. and S. Oswalt (2013), "Comparing Mental Health Issues Among Undergraduate and Graduate Students", *American Journal of Health Education*, Vol. 44/2, pp. 96-107, https://doi.org/10.1080/19325037.2013.764248. [10]

Zając, T. et al. (2024), "Student mental health and dropout from higher education: an analysis of Australian administrative data", *Higher Education*, Vol. 87/2, pp. 325-343, https://doi.org/10.1007/s10734-023-01009-9. [7]

Notes

[1] While expected returns are higher for higher education graduates, findings also indicate that some tertiary education may be better than none at all. Some evidence shows that students who drop out have higher earnings and better employment outcomes compared to secondary education graduates who never attended higher education (Giani, Attewell and Walling, 2020[45]; Jacobson, LaLonde and G. Sullivan, 2005[46]; Jepsen, Troske and Coomes, 2014[47]; Kane and Rouse, 1999[48]; Schnepf, 2015[49]).

Annex A. The TSI project stakeholder Survey

The TSI project stakeholder survey was conducted between March and June 2024. It was designed to understand what stakeholders consider as the main barriers to enrolling in and completing higher education programmes, and to collect examples of situations where these barriers prevented young people from participating in higher education, based on their experience.

This questionnaire included 19 questions about barriers and policy approaches and was aimed at professionals working in the Portuguese education system. It is one of the tools used to improve the understanding of what different stakeholders, in particular the practitioners and decision-makers in this sector, consider to be the main barriers faced by students in accessing and completing higher education. The questionnaire also made it possible to collect examples of situations in which these barriers have prevented young people from participating in higher education. Particular attention was paid to the access to and completion of higher education by young people from socio-economically disadvantaged backgrounds.

Table A.1. Professional roles of TSI project stakeholder survey respondents

Role of the respondents	Number of respondents
Teaching staff	1210
Student and parent representatives	172
Other non-academic staff	172
Social services	137
Management team/board member	122
Other	111
Psychologist	47
Rector or president	46
Admissions services	45

Source: TSI Project Stakeholder survey, 2024.

The TSI project stakeholder survey was designed by the project team in collaboration with the Centre for Research in Higher Education Policies (CIPES, founded by the Universities of Aveiro and Porto) and subsequently translated into Portuguese. It was programmed in Lime Survey and distributed by CIPES, DGES, and DGEstE to all higher education institutions and all secondary schools in the 24 most socially disadvantaged municipalities in Portugal, with a request to the receiver to pass on the TSI project stakeholder survey to the relevant members of staff. By 31 May, the TSI project stakeholder survey received 3 100 responses, out of which N=2 062 responses were valid and used for analysis.

Annex B. TSI Project focus groups

The OECD team organised two rounds of semi-structured focus groups held in person across five locations across continental Portugal in 2024 and 2025. The purpose of the focus groups was to gather insights from stakeholders engaged in supporting the transition of young people from low-income backgrounds from upper secondary education to higher education in different regional contexts.

In the first round, the focus groups were designed to collect information from stakeholders on their perceptions of how low-income can affect opportunities to attend and complete higher education, and opportunities to participate in the most selective programmes in the country. To this end, the TSI project focus groups were structured around four main topics:

Characterising educational opportunities at the local level

- Understanding whether and how opportunities to participate in higher education differ between low-income and high-income local secondary education students
- Exploring reasons for differences between low-income and high-income secondary education students
- Considering reasons why some low-income secondary education students do attend higher education

In the second round, the aim was to discuss and gather feedback on directions for future policy action that have emerged over the course of the project to address situations where barriers mean that young people from low-income backgrounds are disadvantaged relative to high-income students. There was interest in assessing the feasibility of the proposed policy actions and identify potential responsibilities for the feasible actions across stakeholders, government and institutions (i.e. municipalities, secondary schools, and higher education institutions). In line with this, the focus groups were structured around four main topics:

- The role of schools and higher education institutions in mitigating accumulated disadvantage in students' academic achievement leading up to the potential transition to higher education
- The strength of current pathways to higher education for students in vocational secondary education orientations and how they can be improved
- The capability of schools in providing career advice with the resources at their disposal in accordance with their current remit
- Higher education recruitment practices and the collaboration between schools and higher education institutions in complementing in-school career advice

To enable the TSI project focus groups to be facilitated in Portuguese, the OECD contracted the Centre for Research in Higher Education Policies (CIPES) to organise and hold them. The OECD team, in consultation with CIPES and based on existing evidence as well as initial results from the survey, developed a topic guide to steer the discussion for each round. Each session was then facilitated by two members of staff from CIPES and recorded by two dedicated note takers as well as an audio recording. The findings were then analysed thematically and summarised in a report provided to the OECD team along with the detailed notes.

The focus groups were held in five locations across Portugal:

- Northern Portugal: Gondomar, Peso da Régua (including Lamego and Resende), and Covilhã

- Central Portugal: Amadora (including Odivelas and Loures)
- Southern Portugal: Olhão

In the first round, two separate TSI project focus groups were held in each of the five locations: one focused on students in general science-humanistic courses and one focused on students in vocational courses. A summary of the participants can be seen in Table B.1.

Table B.1. Professional roles of TSI project focus group participants, round 1

Role of the participants	Number of participants
Teachers (including programme coordinators)	35
Psychologists	12
Representatives from school boards	7
Technicians	6
Representatives from parents' groups	4
Representative from school councils	1
Total	65

Source: CIPES.

In the second round, one focus group was held in each of the five locations, combining staff from general scientific-humanistic courses, staff from vocational courses, and representatives from higher education institutions. Prior to the meeting, participants received the OECD's recommendations document, titled "Action Plan: Policy Directions for the TSI 2023 Project – Making Higher Education in Portugal More Inclusive". This document is structured around key policy themes, identifying specific challenges and proposing targeted recommendations. A summary of the participants can be seen in Table B.2.

Table B.2. Professional roles of TSI project focus group participants, round 2

Role of the participants	Number of participants
Teachers (including programme coordinators)	23
Representatives of Social Services at HEI	11
Psychologists	7
Parents' Representatives	5
Representatives of Municipalities	4
Representatives of School Boards	1
Total	**51**

Source: CIPES.

The five locations for the TSI project focus groups – referred to as Consultation Communities – were selected to reflect a range of regional contexts in Portugal. The guiding principles of choosing the locations for the Consultation Communities were established in consultation with the Extended Advisory Group and the detailed selection criteria for specific municipalities were developed in collaboration with MCTES.

Three main student-related factors remain the foundation of the final selection criteria: i) the socio-economic composition of the student cohorts completing secondary education; ii) the types of secondary education students participate in; and iii) the geographical context in which students participate in secondary education.

Members of the Extended Advisory Group provided oral and written comments, advocating an approach based on the representation of the current student population. It was suggested that socio-economic background of students and their educational achievement were considered in combination. It was argued

that such a combined approach could take into account different dimensions of equity in educational attainment. For instance, this approach could consider indicators of equality of opportunity and the resilience of lower-income students to perform well despite their disadvantage.

The Extended Advisory Group argued that while representation of different geographic contexts is important, is should not distract from the main aim of representing young people. Therefore, geographical representation was considered as a second-order criterion.

A set of primary selection criteria were applied as the first step in the process of shortlisting municipalities. This comprises three equity-related variables in each municipality in mainland Portugal, where lower-income students are defined by students in receipt of school social action in eligibility bracket A:

1. Low transition rates from secondary education to higher education for lower-income students.
2. Large disparities in transition rates between lower- and higher-income students.
3. A reasonable cohort size of lower-income students.

The condition of low transition rates for lower-income students is defined as municipalities where the proportion of lower-income student transition rate is below the median transition rate for that group across municipalities. The condition of large disparities in transition rates between lower- and higher-income students is defined as municipalities where the disparities in transition rates between recipients and non-recipients of school social action is above the median difference across municipalities.

The final condition relating to cohort size aims to ensure data reliability and the anonymity of any stakeholders and students participating in the qualitative research. Therefore, municipalities were only shortlisted if in the year 2021/22, they had more than 50 secondary education graduates receiving school social action in eligibility bracket A.

In addition to the main TSI project focus groups, an online focus group was held on the island of Madeira.

Higher Education in Portugal

Policies for Access and Success

This report analyses inequities in opportunity to access and complete higher education in Portugal arising from differences in individuals' socio-economic background and presents recommendations for policy action to address these inequities. Specifically, the report focuses on the opportunities for secondary education students to transition to public higher education, and on the opportunities for students who do enrol in higher education to succeed. Wider access to, and success in, higher education helps young people to navigate and thrive in a changing labour market and allows governments to optimise the use of public funds in building a high-skilled workforce. The report takes stock of three key overarching factors that shape opportunities to access and complete higher education in Portugal: prior achievement, financial support and access to information. It also provides an overview of innovative approaches to address drop-out rates using advanced analytics.

Funded by
the European Union

PRINT ISBN 978-92-64-42732-7
PDF ISBN 978-92-64-37608-3

9 789264 427327