Marek KWIEK

From Growth to Decline? Demand-Absorbing Private Higher Education when Demand is Over

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Correspondence to the Author:

Professor Dr. hab. Marek Kwiek
Center for Public Policy Studies (CPP), Director
UNESCO Chair in Institutional Research and Higher Education Policy, Chairholder
University of Poznan, Poland
ul. Szamarzewskiego 89
60-569 Poznań, Poland
E-mail: kwiekm@amu.edu.pl

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MAREK KWIEK

FROM GROWTH TO DECLINE? DEMAND-ABSORBING PRIVATE HIGHER EDUCATION WHEN DEMAND IS OVER

Introduction: European and global growth patterns in private higher education

The growth of the private sector in higher education in Europe[1] – in terms of the number of institutions and the share of enrolments in national systems – has been an educational phenomenon of post-communist transition countries.[2] As Daniel C. Levy (2010: 10) points out, though: "one of the key trends in international higher education, the rapid expansion of the private sector now holds one-third of all global enrollments. However, the growth is not unbroken or inexorable and sometimes stalls and even reverses". Poland is an example of the reversal in question. While the expansion era (1990-2005) was characterized by external privatization (that is, private sector growth, combined with internal privatization, or the increasing role of fees in the operating budgets of public universities), the current contraction era (2005-2025, and possibly beyond) is characterized by what we term "de-privatization". De-privatization also has external and internal dimensions: the gradual decline in private sector enrolments is combined with a decreasing role of fees in public universities.

Private higher education in post-war Europe, before its phenomenal growth in post-communist countries after 1989, emerged first in Spain (1973), Portugal (1979) and Turkey (1981). Following Levy (2002a), the distinction between "elite provision" and "access provision" can be used in exploring this sector: in Western Europe (Austria, Germany, Italy, Portugal, France, Spain, and Russia), private higher education sectors correlate with elite-

[1] This paper is forthcoming in: Mahsood Shah and Sid Nair, eds., Global Trends and Changes in Private Higher Education, Dordrecht: Springer, 2015.
[2] Exceptions include especially Portugal, as well as, to a smaller extent, France, Italy, and Spain; see in particular Portugal as discussed in the last decade in Neave and Amaral 2012, Teixeira 2012, Teixeira and Amaral 2007, and Teixeira and Amaral 2001.

providing roles; in contrast, in most post-communist transition countries, these sectors correlate with access-providing roles (Albania, Bulgaria, Estonia, Poland, Romania, Russia, Ukraine, and Portugal; with Russia and Portugal being included in both categories, Fried et al. 2007: 645-646). In Poland, the number of (Levy's) semi-elite private providers is marginal: in all probability, in the range of 10-20 out of more than 300. In some countries (such as, for example, Sweden, Belgium or the Netherlands), nominally private institutions are funded in practice from the public purse, in various forms and under different umbrellas. In this paper, we consider "private" only those institutions which meet the definition of "independent private institutions" formulated by the OECD in its *Handbook for Internationally Comparative Education Statistics: Concepts, Standards, Definitions and Classifications*; these are the institutions that receive less than 50 percent of their core funding from government agencies and whose staff is not paid by such agencies (OECD 2004).[3]

The global demographics of private higher education is such that the major centre of the sector is East Asia, with about 80 percent of all students enrolled in private universities in Japan, South Korea, Taiwan, and the Philippines; in the USA (somehow surprisingly) – only 20 percent; in Western Europe – on average 10 percent or less; in Latin America – over 50 percent in Brazil, Colombia, Peru, and Venezuela; and finally, in European post-communist transition countries, and in some post-Soviet republics, where the most rapid growth took place after 1989 – up to 30 percent (see the most recent data on the PROPHE: Program for Research on Higher Education website). As Levy, PROPHE's director, puts it, "where public budgets do not meet the still rapidly growing demand for higher education, students pay for alternatives" (Levy, 2002: 4) – and this is what happened in Poland following 1989. While Western Europe has not in general witnessed the emergence (or substantial strengthening, depending on the country) of the private sector in higher education, in several post-communist transition countries in Europe, for a variety of reasons, the private sector emerged as a competitor to the traditional, elitist, faculty-centred and often inaccessible public sector. The differences among the transition countries are significant, though.

[3] Thus we do not analyze here those private higher education institutions which the OECD terms "government-dependent private institutions": that is, by definition, those which receive from government agencies more than 50 percent of their core funding, or those whose staff are employed and paid by these agencies.

The changing public–private dynamics

The private sector in Poland cannot be explored outside of the context of the public sector: its future is closely linked to the changing public–private dynamics in the whole system. It is useful to explore its future in the context of two major ongoing processes:

- large-scale reforms of *public* higher education (Kwiek 2014), and
- broad, long-term demographic changes.

The question of its future is much larger, though: as Peter Scott asks in his study on Central Europe; are higher education systems in the region "trendsetters" for Europe (providing models for other European systems), or is the significance of private institutions in this part of Europe "a passing phase attributable to the special circumstances surrounding the transition from communist to post-communist regimes", a response to particular political circumstances i.e. an "internal phenomenon" (Scott 2007: 309)? There is no final answer today; both demographics and politics will play their substantial roles in the next decade. The role of demographics is predictable – but the role of politics is not (Kwiek 2013b). Poland, already beginning to experience severe demographic shifts in higher education (having experienced them already in primary and secondary education), and the fastest-aging society in the OECD area by 2025, needs thoughtful policy responses under changing public–private dynamics. Emergent policies might use more market mechanisms in the public sector, more cross-sectoral competition, and more private funding in both public and private sectors. However, they might also merely follow declining demographics and current funding arrangements in the public sector (no fees for full-time students, despite recent failed attempts to introduce fees for full-time students studying a second field of study or longer than 5.5. years), and let the system be gradually re-monopolized by the public sector. Depending on policy choices, both scenarios are possible. But the policy of no interference, known from the 1990s, seems more plausible today. A continuous increase of tax-based places in the public sector will lead to the ultimate demise (or semi-demise) of the private sector, after a quarter of a century of its existence in Poland. Individual, institutional "strategies for survival" (which Teixeira and Amaral (2007) sought for Portuguese private higher education decline in the 2000s); rather than large-scale changes in national funding architectures; do not suffice in the Polish context.[4] If the status quo is maintained, the contraction period (2005-2025) will bring about the decline of the predominantly demand-absorbing private sector: when demand is over, the sector will shrink.

From the expanding privatized to the contracting publicly-funded university

In general, Polish higher education has changed fundamentally since 1989, both quantitatively (participation rates, the number of students, faculty and institutions) and qualitatively (regained institutional autonomy and academic freedom, shared governance, emergent public–private duality, new competitive research funding regimes, and new fee regimes). The scope of changes and their speed are not easy to comprehend outside the context of the overall post-communist transition to an open, market-driven economy, fully integrated with European Union (EU) economies. The gradual political, economic and social integration of Poland with the EU has been accompanied by a deepening, gradual integration with Western European higher education and research systems, already involved in the deepened European integration processes (Maassen and Olsen 2007, Kwiek and Maassen 2012).

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[4] Major conclusions from research on Portuguese private higher education fit the Polish case perfectly. Major mechanisms in the emergence, growth, and public/private dynamics seem similar. One argument is that the private sector was a cheap solution to the expansion issue: "expansion based on private sources has made possible an increase in enrolment rates at minor cost to public finances" (Teixeira and Amaral 2001: 363). Another argument is about the limited inter-sectoral public–private competition: "the main public institutions … compete among themselves for the best students, for research funds, and even for academic staff. … In general, these [private sector] initiatives have been designed for short-term profit making rather than as sound academic and financial projects" (Teixeira and Amaral 2001: 370). Still another argument is about the demand which exceeded supply: "for the new developing private sector, resources have not been scarce because demand has largely exceeded the available provision. This has meant that private institutions could do what they liked: and this they certainly did. … Institutions have preferred to offer [a] low-quality, low-cost product in order to maximize short-term profits instead of aiming at a better product that in the long run would offer them better prospects of survival" (Teixeira and Amaral 2001: 390-391). Finally, as in Poland, "costly or risky activities" were left to public institutions. For parallel discussions about Polish private higher education, see Kwiek 2012a, Kwiek 2012b, and Kwiek 2010.

Polish higher education by 2005 became a dual (public–private) highly differentiated, strongly marketized and hugely expanded system, with all the ensuing consequences of fast changes for both institutions and the academic profession. Since 1989, the system has witnessed a phenomenal rise in the number of public and private institutions, a rise and fall in the number of students (from 0.40 million in 1989 up to 1.95 million in 2006 and down to 1.82 million in 2010, 1.76 million in 2011, and 1.67 million in 2012), as well as a rise in the number of doctoral students (from about 2,000 in 1990 to about 40,000 in 2012) and in the number of academics (from 40,000 to 99,000 in the same period). The unprecedented expansion of the system and the stunning growth in its accessibility and affordability have led to an increase in the share of the labour force with higher education credentials to about the European average (24 percent in 2012).

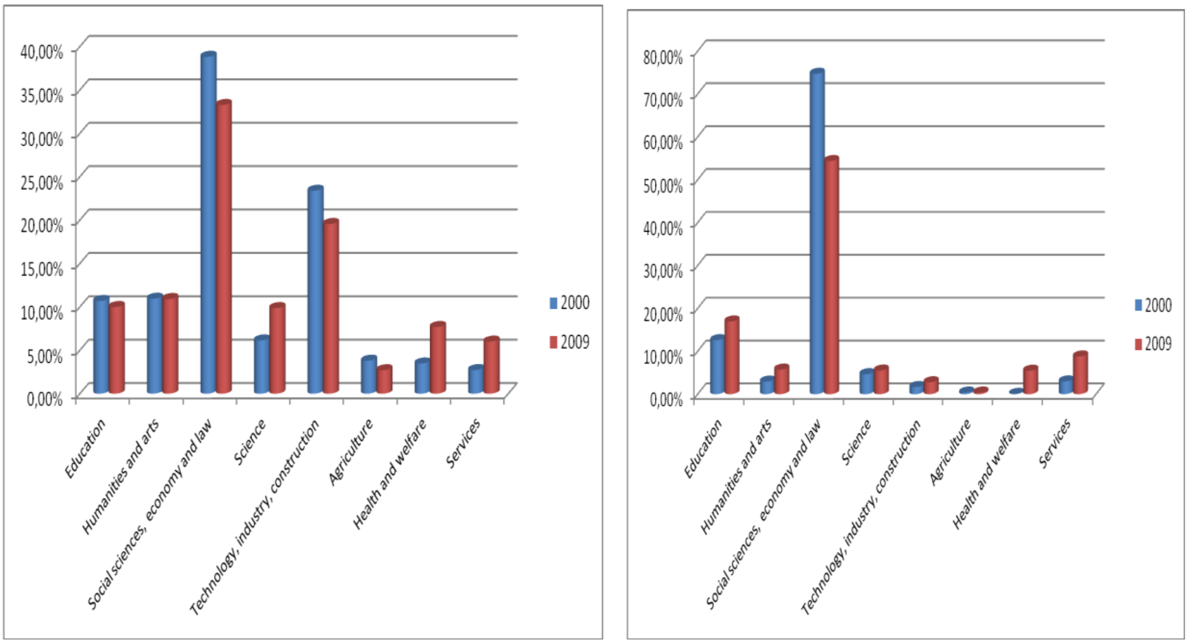
The emergence of the private higher education sector in the 1990s contributed to demand-absorbing growth – but the expansion occurred throughout the two sectors, and throughout the two major modes of studies, full-time and part-time (Poland has the highest share of part-time students in Europe, 45 percent, GUS 2013: 59). The period of expansion can be viewed through the double matrix of two major dimensions: public and private sectors, and full-time and part-time modes of studies, or through a single matrix in which the major dimension is fees. The most prestigious first-choice positions have been free or tax-based places in the public sector; the second-choice positions have been fee-based places in the public sector and in the private sector.

Consequently, Polish students can be defined by the sectors they come from: public and private. But even more fundamentally, they can be defined as fee-paying and tax-based students. Fee-paying students are all students from the private sector (full-time and part-time) and all part-time students from the public sector. Tax-based students are all full-time students from the public sector. While according to the former distinction, 27 percent of students are enrolled in private institutions and 73 percent in public institutions; according to the second distinction, less than half of all students, or 47 percent, are fee-paying students. The first impact of the current powerful reversed demographic trend is seen through the stagnating, and then falling, share of fee-paying students in both sectors (combined) beginning in 2006. The total number of tax-based students have been increasing throughout the last decade, but only in the last four years (2009-2012) did the share of tax-based students increase from 44 percent (2009) to 53 percent (2012) (GUS 2013: 59). Under such declining demographics, the speed of the ongoing changes in student composition by sources of funding (and by sector) has been amazing; it has been a zero-sum game: in student numbers, public sector gains mean private sector losses.

In the 1990s, when the first private institutions appeared throughout Central and Eastern Europe, Polish higher education policy was focused mostly on educational expansion. Private (called “non-public” in legal terms) institutions in Poland and elsewhere in the region were mushrooming; there were limited quality assurance mechanisms and accreditation procedures in place at the time. The expansion of the system was closely linked to an economic policy that encouraged external privatization (the emergence of new private providers) and internal privatization (the emergence of fee-based part-time studies in the nominally free, or tax-based, public sector; on the distinction, see Kwiek 2010, 2013a).

As has been discussed elsewhere in more detail (Kwiek 2013b), the upward trend was accompanied by increasing hierarchical differentiation: much of the growth was absorbed by public and private second-tier institutions as well as by first-tier public institutions in their academically less demanding and less selective part-time studies. Expansion also took place predominantly in specific fields of study, such as, in particular, social sciences, economics, and law (see Figure 1 below, drawn separately for the public and private sectors). In the private sector, the share of students in these areas was more than 70 percent in 2000, and then decreased, but is still about a half of all enrolments. The expansion was financially supported by both public and private sources of funding. The inflow of public funding to the public sector in the expansion period was significant, but equally significant was the inflow of private funding from fees to both sectors. While the private sector is overwhelmingly reliant on tuition fees, the public sector during the peak of expansion (especially in 2000-2005) was also heavily reliant on tuition fees from part-timers which provided 16-20 percent of its operating budget in that period.

Fig. 1: Fields of study; public vs. private sectors, 2000 and 2009.



While Polish higher education in 1970-1990 could be termed unified (Meek et al. 1996, Shavit et al. 2007), in the recent period of expansion (1990-2005) it moved from a unified to a diversified system. Under communism there was no inclination to encourage higher education expansion, either of existing elite universities or through the formation of new, especially non-university institutions. The number of students in the two decades 1970-1990 was strictly controlled by the state and, in general, did not increase. While Western European systems were already experiencing the processes of massification in the 1960s, 1970s and 1980s, higher education in Central Europe was as elitist and inaccessible in 1990 as in past decades. One of the major reasons for the phenomenal growth of private higher education following the collapse of communism in 1989 in (some) Central European countries, and in Poland in particular, was the heavily restricted access to public higher education under communism combined with the new private sector employment opportunities. Increasing salaries in the emergent private sector, combined with increasing educational aspirations, gradually pushed ever more young people into higher education.

The processes of (internal and external) privatization are currently in retreat: we term the ongoing changes the "de-privatization" or "re-publicization" of higher education (Kwiek

2014). Under declining demographics, the number of fee-paying students in the public sector decreased dramatically by almost 40 percent in the period 2005-2012 (GUS 2013: 59), as did the share of income from fee-paying students in the public sector, from 16.6 percent in 2005 to 11.9 percent in 2012 (GUS 2013: 181-184). The number of private institutions is only just beginning to decrease, and the number of mergers and acquisitions in the private sector is on the rise. Specifically, private sector enrolments have been shrinking dramatically, by 30 percent in the period 2007-2012 (from 660,000 to 459,000 students). Ministerial projections show that the share of private sector enrolments may shrink to 12 percent by 2022, and the number of institutions may shrink by 80 percent. The decline of the private sector is fundamental, and cannot be reversed: Poland will witness another decade of its gradual demise, especially that declining demographics is combined with an expanding pool of tax-free places in the public sector. Increasingly (internally and externally) the privatized higher education of the expansion period is becoming ever more public, with an increasing reliance on public funding. "De-privatization" replaces "privatization", against the global trends of increased privatization and cost-sharing in higher education.

Dramatically changing demographics is becoming *the* major parameter of higher education policy: enrolments, expected to fall from about 1.95 million students (2005) to about 1.2 million in 2025, introduce new policy dilemmas. We expect public policy for higher education in times of expansion to be fundamentally different from public policy in times of contraction, the issue having been explored elsewhere in more detail (Kwiek 2013b). Powerful demographic shifts may thoroughly change the structure of the system, and the re-monopolization of the system by the public sector cannot be excluded, due to the gradual (spread over the next decade) decline of the private sector. All public institutions and the surviving privates may be becoming isomorphic: aggressively "client-seeking" under declining demographics.

Possible policy interventions at the macro-level could be in the private sector only (public subsidization of teaching in the private sector), in the public sector only (introducing universal fees in the public sector), or in both sectors (a combination of both policy interventions). However, Poland does not seem to be politically prepared for the introduction of universal fees in the public sector or for the introduction of public subsidies in the private sector. Both might slow down the gradual disintegration processes of the private sector in the coming years, should the sector be deemed worthy of being supported by state interventions, which is not clear today.

Higher education expansion and projections for the future: educational contraction and private higher education

The expansion of the Polish higher system slowed down after fifteen years (1990-2005) and since then the system has been gradually contracting. Further powerful contraction is expected, as projected by scenarios for the years 2010-2025 presented below. The processes of contraction have far-reaching consequences for the future differentiation of the system, public–private dynamics, and the future of private institutions. There are three interrelated dimensions relevant to a study of Polish private higher education:

- The complicated inter-sectoral public–private dynamics with one of the highest degrees of marketization in the system in Europe (an extraordinarily high share of fee-paying students with both the highest share of enrolments and the highest student numbers in the private sector in Europe).
- The most radical demographic changes projected for the next decade from among European Union countries, leading to OECD projections in which the number of students will go down from 1.82 million (2010) to 1.33 million (2020) to 1.17 million (2025).
- A changeable educational policy climate: the possibility of political decisions introducing universal tuition fees in the public sector and direct state subsidization of the private sector. (In the communist period of 1945-1989 and in the last two decades there were no fees for full-time students, and in the last decade there was only indirect state subsidization of the private sector through state-subsidized student loans).

In vertically differentiated systems such as the Polish one, questions like “admissions to what”, leading to “credentials from where”, need to be asked. Two major types of institutions provide two major types of credentials: those from traditional metropolitan, elite public universities, with full-time modes of study – and those from all other types of institutions and modes of study (a part-time mode of study in the Polish context being much less academically demanding than a full-time mode). In the first decade of the expansion (the 1990s), the difference between the two types of institutions and the two types of credentials was not an issue of public concern. Families with high socio-economic capital, usually from the former class of the intelligentsia, who gradually turned into the new middle class of professionals, sent their children to the first type of institutions, as they did in the whole post-war period. The tax-based places in metropolitan elite institutions were scarce and available on rigid meritocratic selection criteria, though the number of tax-based places was increasing throughout the 1990s. However, elite metropolitan universities tried to retain their high quality of teaching in the times of ever-increasing student numbers through channelling the newcomers, mostly from the lower socio-economic classes, to their paid part-time study offers, of considerably lower academic quality. Interestingly, for almost two decades (until a Diploma Supplement was introduced, related to the implementation of the requirements of the Bologna Process in European higher education) there was no trace in master's diplomas of whether the studies were full-time or part-time. Both students and public institutions, for different reasons, were interested in blurring the difference between two types of graduates coming, from an academic standpoint, from clearly different study programmes. Students were increasingly seeking credentials to be used in the labour market and willing to pay for their education, and public institutions were increasingly seeking additional revenues from part-time studies. Elite universities became as open to the newcomers as never before (Wasielewski 2013): the share of students from lower socio-economic classes in tax-based studies reached the 20 percent ceiling in the last decade, and in fee-based studies it was much higher. In particular, the private sector (first emergent and then consolidating) was completely open to new clientele, following "open-door" policies. Newcomers to the education sector after 1989, especially from the lower socio-economic classes, went to new regional public universities, fee-based streams in elite metropolitan public universities, or to the emergent fee-based private sector.

The quality of higher education provided in both public and private institutions, and the differentiation of institutions and credentials, became a public issue only in the second decade of expansion, in the 2000s. The most valuable places – those in elite metropolitan public universities in full-time modes of study – were scarce and competitive. They were socially valuable not only because they were tax-based, but because they were academically demanding. All the other places, much less socially valuable from an overall perspective, and conceived of as much less socially valuable by the intelligentsia-turned-middle classes – were offered to all, in fee-based modes, throughout these two decades. Students, especially from part-time studies in both sectors, to a large extent could be described as "academically adrift": "they might graduate, but they are failing to develop the higher-order cognitive skills that it is widely assumed college students should master” (as Arum and Roksa 2011: 121 put it in an American context).

During the expansion period of 1990-2005, higher education was both accessible and affordable, and the recognition of its differentiation by type of institution and by mode of studies was low. This non-differentiation in the educational arena, paradoxically, seemed useful to all stakeholders: students and their parents, public and private institutions, as well as the state. The state was boasting ever-rising gross enrolment rates and the increasing education of the workforce; public institutions were offering part-time studies for fees and this non-core non-state income played a powerful role in maintaining the morale of academics through increasing their university incomes. The stratification of the system increasingly became common knowledge and governed most student choices only in the second decade of the expansion when the labour market was saturated with new graduates (about 2 million in 1990-2003).

From a demographic perspective, the number of 19-years olds was increasing throughout the 1990s, and until 2002. Since then, the number has been decreasing, and according to demographic projections, it will be decreasing until 2022. In 2020, there will be about 360,000 of them, compared with about 612,000 back in 2005 and 534,000 back in 2010. Also, the pool of potential students (traditionally the 19-24 age bracket in Poland) will be steadily decreasing every year until 2020, from about 3.4 million in 2010 to about 2.3 million in 2020 (a decrease of 31% within a decade).

The future of private higher education in Poland (and the public–private dynamics in the context of a zero-sum game with a fixed pool of applicants) is linked to a demographic much stronger than in any other European Union country. Vincent-Lancrin in his paper on the impact of demography on higher education systems (based on forward-looking quantitative scenarios) stressed the complexity of the relationship:

> All things being equal, demography directly affects student enrolments in higher education because the size of younger age cohorts is a partial determinant of the number of students. … If rates of entry to higher education, together with survival rates, the average length of courses and other student-related factors (age, etc.) remain unchanged, countries in which those cohorts decrease in size will normally experience

> a fall in their student enrolments. Yet the relationship between demography – or more specifically the size of the younger age cohorts – and higher education enrolment levels is a complex one (Vincent-Lancrin 2008: 43).

Increases in rates of access or a change in the length of studies may offset decreases in cohort size. Studies can be made to last longer and access rates will depend on the eligibility rate and the proportion of those eligible who in fact enrol (different aspirations, and incentives, but also different numbers of places): "the actual proportion of entrants also depends, among other things, on the cost of higher education, the financial pressures confronting those otherwise eligible, [the] pecuniary (and non-pecuniary) advantages that they hope to gain from higher education and the length of their studies from an opportunity cost perspective". Student enrolment levels lag behind changes in the size of younger age cohorts, as the demographic shift takes several years to be noticeable (Vincent-Lancrin 2008: 44).

The author presents two scenarios: the "status quo scenario" and the "trend scenario" for OECD countries for the years 2015, 2020 and 2025. In the first scenario, entry rates remain at the 2004 level; in the second, entry rates are extrapolated linearly on the basis of the trends in each country between 2000 and 2004. The fall in enrolment levels in Poland is the highest in the European Union, and comparable in the OECD area only with Korea and Japan. In the first scenario, enrolments in 2025 are expected to fall to 55% of 2005 levels, or dwindle by almost a million students (a fall of 947,000 students). To illustrate the gravity of the challenge; in the EU, only Spain and Germany can expect numerical decreases of more than 200,000 students (Spain by 342,000 and Germany by 209,000, or three and five times less than in Poland). In the second scenario, enrolments in Poland in 2025 are expected to fall to 65% of 2005 levels, or dwindle by almost eight hundred thousand students (775,000). In Spain, the second highest after Poland, the decreases are expected to be five times smaller (165,000 students).

In countries in which higher education is predominantly funded through private expenditure, such as Japan and Korea, and where there is a combination of aging populations, low birth rates and the saturation of higher education markets following the completion of universal higher education, the relationship between demography and higher education enrolments goes in both directions:

> Ironically, the sustained low birth rate in both nations is often attributed to the high cost of education which parents are expected to bear. In these circumstances, financial issues in higher education require special attention not only to maintain universal access but also to prevent further demographic decline (Yonezawa and Kim 2008: 213).

In this context, cost-sharing mechanisms may play different roles in expanding systems than in contracting systems where birth rates are already the lowest in Europe, as in Poland (see Johnstone and Marcucci 2010, and Johnstone 2006 for a comprehensive summary of the rationale for cost-sharing). There may be a vicious circle of expensive higher education (by comparative standards as well as for individuals; both before and after the introduction of cost-sharing mechanisms) and declining birth rates for fear of even higher private educational expenditures in the future combined with an awareness of the social necessity to cover them in mass or universal systems.

In Poland, the 2000-2004 period taken as a reference period for OECD projections was a period of rapid growth, but the growth rate has not re-emerged in subsequent years as the higher education market seems to be already saturated and the pool of applicants has been decreasing for demographic reasons. The difference for Poland between the two scenarios, from a qualitative perspective, is marginal, and if any later period (e.g. 2004-2008) was used as the reference period for projecting the trend in enrolments, it would be even smaller. In both scenarios the Polish case is unprecedented in the European Union, though.

In the present paper, we consider the above OECD status quo scenario as more probable than the trend scenario in the Polish case, and we further develop it adding a political dimension. The reason to add politics is that the laws on higher education and other accompanying laws have been undergoing substantial transformations in Poland in 2008-2012, and the major political issue relating to the future of the private sector and of the public/private dynamics is the possibility of universal tuition fees being introduced in the public sector.

Therefore, we assume here three basic scenarios which relate demography with public/private dynamics (see OECD 2006 for the idea of scenarios in education). From the supply-side, three scenarios are possible:

- enrolments in full-time programmes in the public sector will remain at current levels;
- enrolments will decrease proportionately in both sectors and both modes of study (full-time, part-time) due to declining demographics; and
- enrolments in full-time programmes in the public sector will increase (if the number of places increases by a mere 2%, which is legally allowed for in the next few years, every year between 2013 and 2020, the public sector will be offering more than one million places by the end of the decade; and these are "first-choice places").

In the first scenario, enrolments in full-time study programmes in the public sector will remain stable in 2020 (about 850,000 students, as in 2010); in the second scenario, based on demographic projections, they will be about 550,000 students; and in the third scenario, they will exceed 1,000,000 students. Consequently, in the first scenario, the private sector can expect about 250,000 students; in the second, about 450,000 students; and in the third, only 100,000 or less. These are very general approximations. So far, detailed trend data on the distribution of first-year enrolments between the two sectors and between tax-based and fee-based places in both sectors support the third scenario. Especially that the Polish Constitutional Court has decided (June 2014) that charging fees in the public sector for full-time studies in the case of a second field of study is unconstitutional. The first attempt to introduce fees for no more than 10 percent of students (in 2012), a testing ground before introducing universal fees for all students and an important part of ongoing funding reforms, has failed.

The policy conclusions are surprising: in fact, the biggest private higher education system in Europe ("independent private" in OECD terms, fee-based in practical terms) is heavily dependent for its survival on a change in higher education financing – namely, the introduction of universal fees in its competing *public* sector. It is possible that it is only the introduction of universal fees in the public sector that can stop the gradual demise of the greater part of the private sector, with studying in the fee-based private sector currently being clearly a "second choice" for secondary school graduates. Public subsidization of full-time students in the private sector can be viewed as a half-measure only: in 2012, there were only 83,700 full-time students in the private sector (or a mere 18.2 percent). Even if all full-time students are publicly supported, the remaining 82 percent of private sector students will not be.

If universal fees will not be introduced in this decade, which is very probable, the private sector will be heavily reduced in size. Maintaining the tax-based public sector under declining demographics is a disaster for the private sector, unless there are mergers between both private institutions and between public and private institutions, envisaged in the new law of March 2011. Consequently, lobbying for the introduction of universal fees in the public sector is the most effective survival strategy for the private sector in the years to come. Individual private institutions' strategies count much less than macro-level changes in funding mechanisms for public institutions.

Possible policy interventions can be in the private sector only (public subsidization of teaching in the private sector); in the public sector only (introducing universal fees in the public sector); or in both sectors (a combination of both policy interventions). The segment of higher education with a strong interest in new policy choices is the private sector, expected to be desperately seeking survival strategies at the macro-level of national policies. What seems theoretically possible may be politically complicated; lobbying for the two policy choices is in progress. Given the stability of demographic factors, the unstable, unpredictable political factors are therefore extremely important for the higher education system as a whole and for the future of Polish private higher education.

The Polish private sector is already declining and the public–private dynamics is already changing, and expected to change much more fundamentally in the coming years, as seen in Figures 2 and 3 below.

Fig. 2: Changes in enrolments, 1990-2022 (2013-2022 projections).

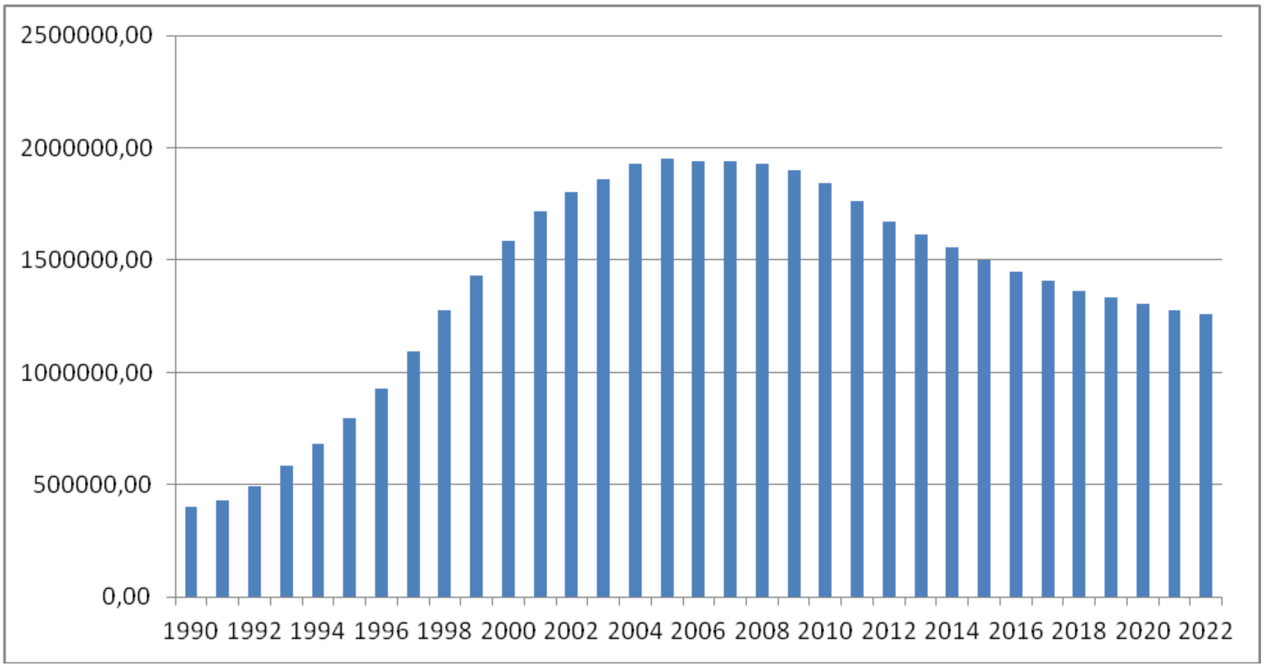
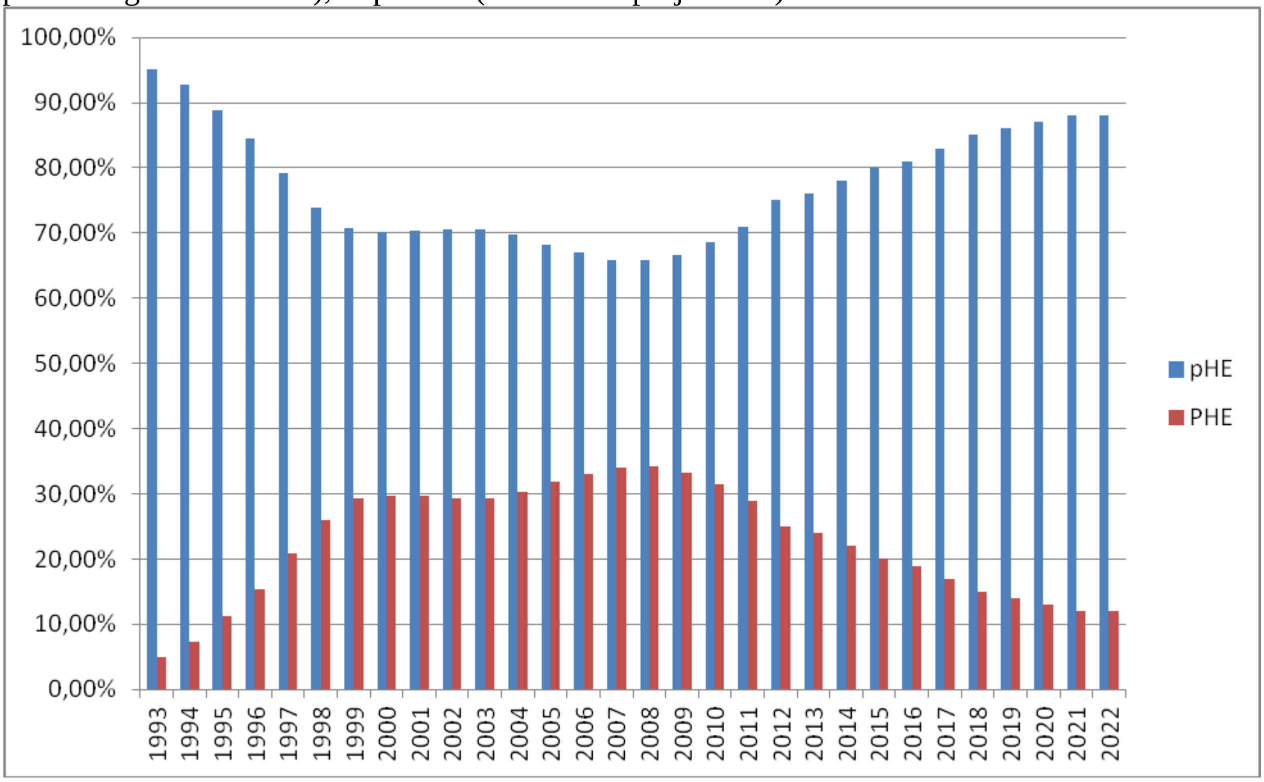


Fig. 3: Changes in the share of enrolments, by sector (pHE – public higher education, PHE – private higher education), in percent (2013-2022 projections).



Surprisingly, and against two powerful global trends of private sector growth (Levy 2009) and cost-sharing in public sector funding (Johnstone 2010, Johnstone and Marcucci 2012, Callender and Heller 2013) in post-massified or universal systems, the Polish dual public–private system is increasingly based on public institutions and their tax-based students. In financial terms, the inflow of fees to the system as a whole, and to both the public and the private sector separately, has also been falling since 2007, and is expected to fall further in the next decade.

The changing share in enrolments over time in the two sectors is U-shaped for the public sector and inverted U-shaped for the private sector, as shown in Fig. 2 above. The processes of the de-privatization of the system, after almost two decades of ever-growing privatization, also denote the parallel processes of the re-monopolization of the system by the public sector (which would be a return to a standard Western European pattern in which the role of the private sector is marginal, Western Europe being "one of the last hold-outs of free higher education" from a global perspective, Marcucci 2013).

In the next decade, the system may be systematically returning to the status quo in which public institutions are in a near-monopolistic position (which means more public–private inter-sectoral homogenization) but they will be forced to differ more in their educational offers than ever before (which means more public–public and private–private intra-sectoral differentiation). The gradual decline of the private sector is thus inevitably leading to the hegemony of the public sector. In all probability, it is a case of *tertium non datur* (although the history of higher education research tends to show that the field should strongly avoid large-scale and long-term predictions).

The decline of private higher education is a rare theme in scholarly literature, as it is a rare phenomenon from a global perspective. But it is also rare for universal higher education systems (in Martin Trow's terms: gross enrolment rates exceeding 50 percent) to be contracting, as is the case in Poland. As Levy stresses,

> Many types of private higher education do decline and for various reasons. Yet, private higher education grows significantly despite all the negative factors identified. The overall private higher education decrease almost always refers to public- and private-sectors shares, not absolute enrollments. Even proportional decline in the private sector applies only to a minority of countries. The most vulnerable private higher education is the demand-absorbing type, which underscores that all parts of the sector do not face constant vulnerability (Levy 2010: 11-12).

Poland (together with several other post-communist European countries) is exceptional from a global perspective: both private shares in enrolments and also absolute enrolments in the private sector have been decreasing over the last five years. The private higher education sector may expect to enrol still fewer students every year and for a system in which there are 315 private institutions it is an enormous institutional funding challenge. The demographic shift in Poland creates a major institutional funding challenge to all public institutions and introduces fierce competition among them; but for private institutions, it may be a life or death challenge. As a recent study by the national Institute for Educational Research (IBE 2011: 110) points out, “it has to be assumed that a part of [the] newly created private institutions, of relatively poor educational offer, opened to meet the demand from the generation from the 1980s … will not be able to survive” (IBE 2011: 110). A single survival strategy suggested by the Institute is the change of offer from higher education to adult education. Similarly, Ireneusz Białecki and Malgorzata Dąbrowa-Szefler (2009: 194) stress that demographic trends represent “a clear danger, above all for the financially weaker and poorer-quality fee-financed private HEIs”. These findings are consistent with Levy’s global conclusions about private higher education (2011: 5): “Much PHE has not had to offer very much, other than access and the prospect or hope of a degree. Logically, then, it is the demand-absorbing subsector of PHE that is most vulnerable when demands slows”. But, at the same time, the trend will affect each institution separately, and, consistent with what Arthur Levine et al. wrote about the demographic challenges of the 1990s in American higher education, it is important to recognize that each college and university can determine its own future: “Every college in America is facing [a] somewhat different set of demographic circumstances. Each has the ability to do nothing, to hope for serendipity, or to shape tomorrow. The choice is entirely theirs” (Levine et al. 1989: 180).

In Poland, the current and projected decline is fundamental rather than limited in duration. It is unclear to what extent Poland is politically prepared for the introduction of universal fees in the public sector or for the introduction of subsidies in the private sector. It is also unclear to what extent the survival problem of the private sector will become a major policy problem to be solved by politicians. The introduction of fees may also be politically difficult in a climate of economic crisis.

Expansion in Poland in both the public and private sectors was classically demand-driven: students and their families demanded more access to higher education following the collapse of communism, and their demand was being increasingly met. Higher education was no longer strictly rationed by the state, and the processes of massification were fuelled by both sectors and both modes of study. Both sectors, at the same time, were strongly "client-seeking" in the times of expansion; but the question is to what extent "client-seeking" behaviours may be even more pronounced in the times of contraction, with far-reaching consequences for admissions criteria and selectivity.

> Clearly, the imperatives of client-seeking and status-seeking behaviors conflict with one another. Client-seeking implies low admissions criteria while status-seeking implies fewer clients than could otherwise be admitted. The conflict is often resolved through the differentiation of a status-seeking first tier of institutions and a client-seeking second tier, which is less selective and enjoys lower prestige. Thus, we expect to find greater enrollment rates and more institutional differentiation in market systems than in state-funded systems (Arum et al. 2007: 8).

The Polish system is more market-like than most state-funded European systems but also much more state-funded than most global market-funded systems, such as the United States, Korea or Japan. The increasing stratification of higher education institutions along client-seeking and prestige-seeking lines is a discernible process in times of system expansion. Most private institutions were more client-seeking than most public institutions; and both public, in their part-time studies, and private institutions were clearly focused on income-generation from fees. What will happen to these processes in times of the system contraction? All institutions, public (elite and regional) and private (both semi-elite and demand-absorbing), might potentially be forced to become increasingly client-seeking (with perhaps no significant difference whether the clients will be tax-based students funded by the state or self-funded fee-based students, no matter whether universal fees in the public sector are finally introduced in the coming decade or not). The introduction of universal tuition fees in the public sector, not attempted so far except for a test regarding a second field of studies, may fundamentally change the inter-sectoral dynamics in the system, e.g. allow a higher proportion of private institutions to survive than otherwise would in a landscape with a tax-based public sector, but in the context of demographic decline this does not have to contribute to the maintenance of the differentiation between client-seeking and status-seeking institutions. Both sectors may find it necessary to become as aggressively client-seeking as the private sector was throughout two recent decades.

It can be assumed that in contracting systems, the selectivity of all institutions, including elite and regional, semi-elite and demand-absorbing, in both the public and private sectors, can be expected to decrease over time. Admissions criteria can be expected to be less stringent, and access for candidates from lower socio-economic classes to institutions which are highly selective today may be increasingly less based on meritocratic criteria. The metropolitan elite public universities may be expected to become more accessible to all social strata if their current capacities (human resources and infrastructure) are to be maintained. To maintain their current levels of selectivity, they would have to decrease their capacities as contraction processes progress in the next 15 years. From a political economy perspective, large-scale cuts in jobs in public higher education leading to a contraction in the public segment of the system are conceivable, but probably not in the coming decade. The 2011 reforms are only beginning to be implemented, and there seems to be no political will to decrease the pool of academics in this sector (see a synopsis of two decades of changes in Polish higher education in Kwiek 2014, and a European context in Kwiek 2003, Kwiek 2009a, and Kwiek 2009b).

Standard supply-side solutions for private providers in a contraction era could potentially be the provision of high-quality, socially-recognized and labour-market rewarded education. But the policy of non-interference and loose governmental control in the 1990s contributed to low competitiveness and low social recognition of the private sector vis-à-vis the public sector. A handful of exceptions (10-20 private institutions mostly located in Warsaw, the capital city, which could be called, following Levy 2009, "semi-elite") does not make a dramatic difference but needs to be noted.

Since demographic trends cannot be altered within a decade, the private sector is seeking to redefine national higher education funding architectures. In the good times of ever-increasing student numbers, the independence of the private sector from the state was key. Today, targeted state interference (the introduction of universal fees in the public sector or of state subsidies for teaching in the private sector, based, for instance, on competitive bids announced for various fields of study, periodically announced by the Ministry) seems the only long-term policy solution for the majority of privates. Still, the question is whether the subsidization of full-time students in the private sector, as a policy option, would dramatically change the future of private providers. The higher education market is increasingly a "prestige market" or a "positional market" and credentials, as well as the jobs and incomes these credentials lead to, are “positional goods” (see Brown et al. 2011: 136, Hirsch 1976: 59-52, Frank 1985: 7-8, and especially Marginson 1997: 38-46). As elsewhere in Europe, prestige comes from traditional elite public universities.

Recent policy proposals (2011-2013) seem to indicate a possible change in policy patterns in financing higher education. Following Levy’s typology of public/private mixes in higher education systems (Levy 1986a), they might indicate a policy move towards the homogenization of the two sectors. However, the road to what is termed in official documents of the Polish rectors’ conference “the convergence of the two sectors” is a long and uncertain one. The idea of public funding for both sectors, and universal fees in both sectors for all students, has been fervently discussed in the last five years, and this convergence does not seem to be any closer.

Private-public blends involve a number of important questions: a single sector or a dual one; if a single sector, statist or public-autonomous; if dual sectors, homogenized or distinctive; and if distinctive, minority private or majority private? (Levy 1986a: 198). The policy move suggested by the idea of the “convergence of the two sectors” in this typology, would be from the fourth pattern (dual, distinctive higher education sectors: smaller private sector funded privately, larger public sector funded publicly) or the third pattern (dual, homogenized higher education sectors: minority private sector, similar funding for each sector. Levy’s first and second patterns refer to single systems, with no private sectors).

The policy debates about private-public financing emerging in Poland today are not historically or geographically unique. Levy identified three major policy debates in his fourth pattern of financing: the first concerns the very growth of private institutions; the second concerns whether new private sectors should receive public funds; and the third policy debate concerns tuition in the public sector. While in the 1990s, the debate about growth dominated in Poland, the 2010s can be expected to be dominated by debates about fees and public subsidies. In a highly centralized system, with a long tradition of strong government influence on public policy in higher education, the answers to the both the fees and subsidies debates are strictly political.

The fall in enrolment levels in Poland is projected to be one of the highest in Europe, and comparable only with other post-communist countries: Bulgaria, Romania, Slovakia, Estonia, Lithuania and Latvia. According to several consistent enrolment scenarios based on national statistical data (such as e.g. Vincent-Lancrin 2008: 45, Antonowicz and Godlewski 2011: 10-14, IBE 2011: 110-11, Ernst and Young 2010: 20) enrolments in Poland in 2025 are expected to fall to 55-65% of 2005 levels. In Western Europe, only Spain and Germany can expect numerical decreases of more than 200,000 students by 2025 (Vincent-Lancrin 2008: 49-51). Certainly, as Easterlin (1989, 138) confirmed in the US context, there is an "inverse association between college enrollment rates and the size of the college-age population" (and what Frances terms "the cohort effect", Frances 1989: 143); "enrollment rates, in fact, partly depend on the size of the college-age population – other things remaining constant, at the aggregate level a larger college-age population makes for lower enrollment rates, while a smaller college-age population makes for higher rates" (Easterlin 1989: 137). Demographic factors need to be combined with social, economic, and public-policy related factors in any meaningful projections for the future.

Conclusions

The Polish case study is important for several reasons: the public–private dynamics is rapidly changing in a system which has the highest enrolments in the private sector in the European Union today. In the global context of expanding higher education systems there are several systems in Central and Eastern Europe, and Poland is the biggest of those which are actually contracting. Their contraction is fundamental and rooted in declining demographics. In the global (rather than European) context of increasing reliance on cost-sharing mechanisms and on the private sector growth paradigm in university funding, the Polish system seems to be moving in the opposite direction: global trends towards privatization can be juxtaposed with the Polish counter-trend towards de-privatization. The number of private institutions is decreasing and is expected to decrease much further; the share of private sector enrolments is decreasing and is also expected to decrease much further, as is the number of private sector students. Furthermore, the number of tax-based places in the public sector is on the rise, and income from fees (charged to part-timers only) has been steadily declining. To put it in a nutshell: there are ever more public sector students compared with private sector students, and ever more public revenues compared with private revenues. The number of private providers is shrinking and the number of fee-paying students in the system as a whole is shrinking too.

Poland is the most vivid example in Europe regarding the combined impact of demographic and political factors on public–private dynamics in higher education.

After a quarter of a century, declining demographics is transforming the growth of the private sector into a gradual decline, and the general trend of privatization in the expansion period into a general trend of de-privatization in a contraction period. However, as we higher education researchers know, any definite conclusions and large-scale predictions should be avoided as the number of "known unknowns" and "unknown unknowns" in higher education is unlimited.

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Professor Marek Kwiek
Center for Public Policy Studies, Director
UNESCO Chair in Institutional Research and Higher Education Policy, Chairholder
University of Poznan, Poland
kwiekm@amu.edu.pl

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