



# Education and Training 2010 Conferences

on Implementing the **EU** Work Programme in Hungary

Budapest, 22 October and 8 November 2004



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## **WELCOMING ADDRESS**

As part of the Lisbon strategy, in 2001 the Council of the European Union set the overall objective for the Community that the standard and quality of European education and training systems must serve as an international model and reference by 2010. The fulfilment of this ambitious objective is an immense challenge for all Member States.

The detailed and concrete work programme to follow up the objectives for 2010, both in terms of content and the recommended procedures and methods, opened a new chapter in the educational policy of the European Union, as far as quality is concerned. The novelty of this work programme derives primarily from the fact that it sets specific quantitative and qualitative targets and deadlines for education and training, arising from the joint commitment of the Member States. They are to be implemented within a national framework, and the Member States will jointly monitor and evaluate the progress towards the fulfilment of the programme until 2010.

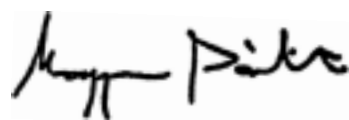
With our accession to the European Union, we have gained an opportunity not only to join the implementation of the work programme, but also to add value to the process itself and to contribute to its further development by Hungarian initiatives and national experiences. Our participation in the work programme is of key importance from the perspective of the future of Hungarian education policy as a whole. While a framework is being created to enable the Hungarian education and training system, with its rich and progressive traditions, to contribute actively to the common European objectives under the Lisbon strategy, our activities - aimed at renewing the Hungarian educational policy and to close the gap between itself and European educational policy - will gain new momentum and inspiration. Our participation in the implementation of the work programme will help us see our achievements and deficiencies in a more realistic manner and to learn from our partners. All these will have a perceptible and an instantly inspiring impact on the mindset and practice of the domestic educational policy.

For the implementation of the work programme, it is essential for policy makers, decision makers, researchers and practicing professionals to co-operate as partners who listen to each other. This should be an illuminating exercise in

itself as it would encourage a more intensive dialogue, joint thinking, and actions among the actors of various ranks working on different educational levels. The Ministry of Education wishes to provide extensive support and encouragement to this type of peer learning.

The two conferences which were organised in succession, arm in arm with the Tempus Public Foundation, backed by the professional and financial support of the European Commission, are significant milestones in the implementation of the concrete work programme. These two conferences provided a unique opportunity for the domestic actors involved in the implementation of the work programme to jointly review and objectively evaluate the progress so far, and the results achieved, and to compare the procedures and methods applied in their work with the experiences gained by other Member States in this field, which may also be used by Hungary.

The dialogue which took place in the above events gave fresh motivation to Hungarian participation in this ambitious, common European undertaking, and they were a significant contribution to generating publicity in Hungary for the work programme, as well as for the educational policy objectives of the European Union.



Bálint Magyar  
Minister of Education of the Republic of Hungary

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## INTRODUCTION

In accordance with the strategic decision adopted by the Lisbon European Council in 2000, the European Union must become the most competitive and dynamically developing knowledge based economy in the world by 2010. In this process, education and training have a key role.

The Education Council and the European Commission adopted a detailed work programme that should be implemented by 2010 to achieve the Lisbon goals. This work programme defines objectives under three strategic goals, i.e. quality and effectiveness, opening-up education and training systems to the wider world, and access, which cover a wide range of policy fields within education and training.

The Member States' task is to develop action plans that reflect their own development goals and to take concrete steps for the implementation of the objectives adopted by the Council.

The Ministry of Education informed a wide circle of stakeholders about the 'Detailed Work Programme on the Follow-up of the Objectives of Education and Training Systems in Europe' in February 2003. The main aspects of national participation in the implementation of the Work Programme are the following:

- Participation in the work of EU Working Groups through the contribution of national delegates;
- Analysing in professional circles the results of the work done at European Union level and making proposals for the decision makers concerning national actions;
- Identifying the national tasks that are conducive to the achievement of common EU goals and incorporating them into the national development processes;
- Providing the Union with information, reports and technical documents about the national situation, including the dissemination of our results and good practices.

In 2004, the Ministry of Education organised two conferences to inform and to discuss with the stakeholders the opportunities and tasks relating to the national implementation of the Work Programme. On 22 October, a wide circle of experts - teachers, educationalists, researchers, policy makers - analysed the national situation and made recommendations concerning the implementation of EU objectives and the national tasks (II.1 Experts' Seminar). The aim of the event of 8 November (II.2 Strategies of the Subsectors in the Education Sector) was to inform a wide circle of professionals involved in education and training how the implementation of the Work Programme "Education and Training 2010" is reflected in the activities of the education and training sector and how European objectives are incorporated in the most recent policy documents.

The publication "Education and Training 2010" intends to provide those who participate in education and training with a picture on the progress made towards the implementation of the Work Programme, the tasks and the opportunities ahead, and the role these participants can play in this process.

*The editors*

## **I. IMPLEMENTATION OF THE "EDUCATION & TRAINING 2010" PROGRAMME AT EU LEVEL**

### **I.1. OUTLINE OF THE CURRENT SITUATION, TASKS (edited on the basis of the documents of the European Commission)**

#### **The Lisbon Strategy and the "Education & Training 2010" Work Programme of the EU**

Pursuant to the strategic decision adopted by the Lisbon European Council in 2000, the European Union must become the most competitive and most dynamically developing knowledge-based society in the world by 2010. In this process, education has a key role.

In order to attain the Lisbon goals, based on the "Report on the concrete future objectives of education and training systems"<sup>1</sup>, the Education Council and the European Commission adopted in 2002 a detailed *work programme*<sup>2</sup> for education to be implemented by 2010. The work programme identifies 13 objectives related to three strategic goals<sup>3</sup> which encompass a wide range of policy areas in education and training.

The political, professional and legal framework of the co-operation of Member States during the implementation of the objectives of the work programme is the *open method of co-ordination* adopted by the Lisbon Summit. Its elements are:

- identify objectives jointly;
- disseminate good practices, formulate policy proposals for the countries participating in the process;
- develop quantitative and qualitative indicators;
- consider adaptability to national policy, monitoring, joint evaluation, ensuring a mutual learning process, peer review.

In line with the objectives set by the Lisbon European Council, the EU Education Council adopted in May 2003 six qualitative indicators or "*benchmarks*"<sup>4</sup> which can be used to compare the EU average with the performance of the United States and Japan in educational issues that are of key importance in terms of economic competition and social development. These benchmarks of strategic importance are the following:

1 Report from the Education Council to the European Council: „The concrete future objectives of education and training systems“ <http://register.consilium.eu.int/pdf/en/01/st05/05980en1.pdf>

2 Detailed work programme on the follow-up of the objectives of Education and training systems in Europe [http://europa.eu.int/eur-lex/pri/en/oj/dat/2002/c\\_142/c\\_14220020614en00010022.pdf](http://europa.eu.int/eur-lex/pri/en/oj/dat/2002/c_142/c_14220020614en00010022.pdf)

3 The three major goals are:

1. to improve the quality and effectiveness of EU education and training systems;
2. to facilitate access to education and training systems to all;
3. to open up education and training systems to the wider world.

4 [http://europa.eu.int/comm/education/policies/2010/doc/after-council-meeting\\_en.pdf](http://europa.eu.int/comm/education/policies/2010/doc/after-council-meeting_en.pdf)

- Early school leavers: “by 2010, an EU average of no more than 10 % early school leavers should be achieved”.
- Graduates in mathematics, science and technology: “the total number of graduates in mathematics, science and technology in the EU should increase by at least 15 % by 2010 while at the same time the level of gender imbalance should decrease”.
- Completion of upper secondary education: “by 2010, at least 85 % of 22-year-olds in the European Union should have completed upper secondary education.”
- Basic skills: “Therefore, by 2010, the percentage of low-achieving 15-year-olds in reading literacy in the European Union should have decreased by at least 20% compared to the year 2000”.
- Lifelong learning: “by 2010, the European Union average level of participation in Lifelong Learning, should be at least 12.5% of the adult working age population (25-64 age group)”.
- Investment in human resources: The Lisbon European Summit called for a substantial annual increase in the per capita investment in human resources.

The EU Member States define for themselves where they wish to set their own benchmark, depending on their background and educational policy objectives. Therefore, achieving the EU objectives and benchmarks is not compulsory for the Member States, but they are of orientating nature.

The Member States’ task is to develop action plans to follow up their own development objectives, and to take concrete measures for the implementation of the objectives adopted by the Council.

## **The First Phase of the Implementation of the Work Programme**

### ***The working groups and their activity***

In the first phase of the work (2001/2004), the European Commission set up 10 working groups in order to support the implementation of the common objectives. Hungary has taken part in the work of these groups since the end of 2002. The first phase of work was necessary in order to identify the priority themes, make an inventory of existing initiatives, define a preliminary list of indicators for monitoring progress. Most of the working groups worked on a first round of collection of examples of good practice with regard to policy and strategy implemented in the different countries.

In addition to the 10 working groups dealing with educational issues, three technical working groups (CPH Groups) have been working since November 2002 on the implementation of the concrete, VET-specific priorities defined in the Copenhagen declaration.

An activity report was produced by each group during the summer of 2003<sup>5</sup>. A stocktaking report on the progress made in implementing the priorities of the Copenhagen Declaration was also produced by the Copenhagen Coordination Group. These reports contain policy messages and recommendations to the national decision-makers.

Following these first 2 years of implementation of the “Education & Training 2010” programme and the recognition that more concrete and policy-related material should be produced to support progress at the level of national policies, the working methodology has slightly been adapted since the beginning of 2004, particularly through the creation of some sub-groups in order to tackle more concretely and efficiently key issues identified.

In 2004, all groups should come up with a comprehensive report. It is hoped that these new reports will provide concrete and useful policy-related material to support the contribution of the education and training fields to the 2005 Mid-term review of the Lisbon Strategy and the preparation of the next 2006 “Education & Training 2010” Joint Report.

### ***Main outcomes of the first phase of implementation of the process 2001-2004***

By the end of 2004, we will have the following concrete outputs:

#### *European definitions, principles, and criteria*

#### *Key Competences and teachers/trainers’ profile* (Groups A and B outputs)

A proposal for a European framework of eight Key Competences which young people should have acquired by the end of their compulsory schooling.

A proposal for a Common Framework of European References for teachers’ and trainers’ qualifications and competencies.

#### *Validation of non-formal and informal learning* (CPH and H Groups)

Common Principles for validation of non-formal and informal learning

#### *Lifelong guidance* (CPH and H Groups)

Strengthening policies, systems and practices in the field of lifelong guidance in Europe

Handbook for policy-makers

#### *Transparency & Quality Assurance in VET* (CPH Group)

Single framework for the transparency of qualifications and competences (Europass).

Common quality assurance framework

#### *Credit transfer in vocational education and training* (CPH Group)

Proposal for the basic design, principles and common reference levels of a credit transfer system for VET

#### *Mobility* (Group F)

<sup>5</sup> See Commission website on « Education & Training 2010 » : [http://www.europa.eu.int/comm/education/policies/2010/et\\_2010\\_en.html](http://www.europa.eu.int/comm/education/policies/2010/et_2010_en.html)

A draft charter on the quality of mobility for learning purposes.  
A reference framework for policies to promote access to mobility, with a particular emphasis on small and medium-sized enterprises and disadvantaged persons.

#### *Policy-related recommendations*

An important part of the 2004 reports of the working groups will be the recommendations addressed to national policies which will be mainly based on the outcomes of the sub-groups, the “mapping” of the implementation of recommendations agreed upon in 2003 and new practices collected.

#### *Material concerning relevant policy-practices*

The work done since 2002 enabled the groups to assemble information on policy initiatives/ practices considered relevant by the experts to support mutual learning between the countries involved. In the near future it is intended to make available the most relevant practices collected so far and to consider their integration into the database which Cedefop is planning to develop on good practices in the field of lifelong learning.

#### *Work on indicators*

The development of a reliable and relevant set of education and training indicators to support the monitoring of progress towards the common objectives and benchmarks set for 2010 is an essential task.

A first step in this direction was achieved in 2003 with the agreement on a first selection of 29 objectives-related indicators. A first analysis of these indicators in particular in relation to the five benchmarks approved by the Council in May 2003 was adopted by the Commission in January 2004.

### **First Joint Interim Report**

The first Joint (interim) Council/Commission report on the implementation of the Lisbon strategy in the fields of education and training was adopted by the 2004 Spring European Council. The main message of the report is the following: “The pace of reforms of education and training systems should be accelerated” if the overall Lisbon objectives and the one specifically set for education and training are to be achieved by 2010 and the “Education & Training 2010” programme should be duly taken into account in the formulation of national policies”.

The following three priorities have been agreed upon in the Joint Report:

*Reforms and investment should focus on key areas for the knowledge-based society*, involving a higher level of public sector investment in key areas and, where appropriate, a higher level of private investment. The necessary increase should be combined with a more efficient use of resources.

*Make lifelong learning a concrete reality*. Member States should step up their efforts towards developing coherent and comprehensive lifelong learning strategies, possibly by 2006.

*A Europe of education and training* should be established, in particular by putting in place in the near future a European Qualifications Framework for higher education and vocational training.

The Joint Interim Report demonstrates well the evolution of a more integrated approach to the major policy strands (the Concrete Future Objectives, Lifelong Learning, the Copenhagen process and the Bologna process).

### **Next Phase of Work (2004-2006)**

#### ***Linking higher education and VET: Development of the European Qualifications Framework (EQF)***

The mandate of the Joint Interim Report is to develop “a European framework to stand as a common reference for the recognition of qualifications”. Such a framework will facilitate the smooth functioning of a European labour market, and will have important implications for European citizenship, equal opportunities and social inclusion. The report explicitly says that the European Qualifications Framework (EQF) should refer to competences and learning outcomes, thereby broadening its scope beyond formal qualifications.

The Irish Presidency conference on HE and VET (8 March 2004) recommended that the EQF should, in an initial stage, link together the qualifications framework for the higher education area (to be agreed at the Bergen Ministerial meeting in May 2005) and the common reference levels for VET (to be agreed at the Maastricht conference in December 2004, along with the basic design and principles of a credit transfer system for VET).

In addition, the common references and principles being developed as part of the Education and Training 2010 work programme, aimed at supporting transparency, quality and mutual trust, should also be linked to the EQF.

#### ***Priorities and actions in the next phase 2005-2006***

The Commission considers that in the next phase of work, on the basis of the outcomes of the first phase, the working methodology must be changed to ensure a more concrete implementation of the work programme and to support in a more relevant manner the needs and identified priorities of national policies. The Commission’s intention is to reconvene the big working groups only when really necessary and to favour the meeting of smaller groups of experts for specific purposes.

In the next phase of work, working groups’ outputs must be widely disseminated, the information collected on successful policy practices, through the various working groups but also through the indicators’ analysis around the bench-



marks' areas and other means (Copenhagen process; studies; sources of other international organisations) should also be better exploited.

#### ***Next phase of the Copenhagen process***

The Copenhagen Declaration of November 2002 stated that "A meeting in two years' time will be held to review progress and give advice on priorities and strategies". Accordingly, in December 2004 a Ministerial Conference will be organised, in the framework of which the *Maastricht Communiqué* will be launched. The aim of the Communiqué will be to update the Copenhagen declaration of November 2002, emphasising the need to implement at national level the common references and principles agreed at European level, and setting out new priorities for enhanced European cooperation in VET.

#### ***Developing a more integrated approach***

The Interim report states that "the impact and visibility of the Education and Training 2010 process depend on the consistency between the different initiatives. By 2006 the incorporation of actions at European level relating to vocational education and training, lifelong learning and mobility should be a reality. For the period ahead, steps will be taken to better define the mandates of the working groups, rationalise methods and enhance synergy".

The Copenhagen priorities and working structures should be gradually brought within the overall "Education and Training 2010" work programme. The working structures of the "Education & Training 2010" process will need to be reviewed in 2005, in order to develop certain cross-cutting issues, for example across VET and higher education, and between education and training systems and working life.

In addition, a more integrated approach at European level should be matched by better coordination at national, regional and local levels. As a first step, the high level group could be foster the setting-up of Education & Training 2010 committees at national level, involving as a minimum all relevant ministries plus the social partners (ideally a wider audience should be invited).

#### **Working groups and sub-groups created in 2004**

1. WG A on Teachers and Trainers	SG1: on teachers' professionalism SG2: on indicators SG3: on quality in VET
2. WG B on Key Competences	SG1: on the less-advantaged groups SG2: on the European Dimension SG3: on entrepreneurship
3. WG on Languages	No sub-group
4. WG C on ICT	No sub-group
5. WG D on Maths, Science & Technology	SG1: on school-university partnerships
6. WG E on Efficient Use of Resources	SG1: on efficiency of resources SG2: on private investment
7. WG F on mobility and European cooperation	No sub-group
8. WG G on Citizenship/Social Inclusion	SG1: on LLL for democratic citizenship SG2: on persons with disabilities in LLL
9. WG H on Making Learning Attractive	SG1: on indicators
10. Standing Group on Indicators & Benchmarks (SGIB)	Task Force on Mobility Task Force on Learning to Learn Task Force on Teachers and Trainers (with Group A)

## **I.2. ACTIVITIES OF EU WORKING GROUPS reports provided by the national delegates**

### **Activities of Working Group A on Improving Education of Teachers and Trainers**

#### **1. Challenges:**

The knowledge based society envisaged by the European Union implies new challenges within the field of education and training and towards teachers in particular. Therefore, renewing teacher education and in-service training is a fundamental task in achieving the objectives set in the EU work programme for education by 2010. In this context, the working group on teacher education (Working Group A) has concluded that improving the working conditions and the career structure of teachers is essential for making the teaching career attractive. Teachers must be offered continuous professional development programmes that enable them to adapt to their changing role in society. According to the Working Group, this requires the creation of a common European framework for the quality of teachers and trainers' competences and qualifications, as well as the development of indicators to measure the professional development of teachers and trainers.<sup>6</sup>

In addition to the above mentioned points, this framework is determined by further factors. The 2004 Interim Report underlines the importance of establishing a common European framework of references and principles in the context of the strategic approach to lifelong learning. Such a framework of reference will create mutual trust among key actors. It is also necessary to equip individuals with the necessary competences; to create an open and attractive learning environment which is accessible for all and provides room for social inclusion. Furthermore, the document stresses the importance of creating a general European Qualifications Framework, increasing mobility and enhancing the European dimension in education.<sup>7</sup>

<sup>6</sup> Three sub-group has been set up within the working group for improving education and training for teachers and trainers:

Promoting professionalisation of teachers

Developing appropriate indicators

Quality assurance and teachers and trainers (in VET)

These sub-groups (of approx. 10 persons) are composed of a few members of the working groups, members of some other working groups and a few representatives from the Commission. The essence of focusing on vocational education and training is that a high proportion of students participate in vocational education, and the training needs of teachers and trainers working outside formal education can be best studied in this sector.

<sup>7</sup> European Qualifications Framework: A common European framework for the recognition of qualifications in the labour market to facilitate the recognition of people's diplomas and certificates in all Member States of the European Union. Mobility refers to the free movement of European citizens in both the labour market and the educational institutions.

## **2. Common European framework for the quality of teachers' and trainers' competences and qualifications (work of the sub-groups on teacher professionalism and quality assurance)**

### **2.1. Main guidelines for the common European framework for the quality of teachers' and trainers' competences and qualifications:**

- Those who prepare for a teaching or training career need a qualification at tertiary level – teachers need a course based on research, and trainers need another appropriate, professionally recognised level of education;
- The issue of competences should be viewed from a lifelong learning perspective;
- Continuous professional development should be with individuals and institutions in partnership (teachers, institutions, employers, parent organisations and educational authorities);
- Mobility should be an integral part of professional development both at initial training and in-service training. Mobility is the European added value within the development of an optimal learning environment;
- The European dimension should be enhanced in the curricula and programmes of initial training;
- Appropriate professional support must be provided to those who are responsible for the education of teachers and trainers;
- The support of a system of European central institutions is needed for enhancing the European dimension;
- It is important to ensure the enforcement of the main principles of lifelong learning, the Copenhagen process and the Bologna process.

### **2.2. Additional general principles:**

- The references and principles provided by the framework primarily apply to outcome-centred policy, but they do not disregard input- and process-centred policies either, in particular in relation to qualifications;
- The framework contains some of the required competences only;
- A framework summarising competences should focus on the entire process of continuous professional development (initial training, practical training, in-service training).

### **2.3. Concrete requirements:**

- Education for European citizenship – all students who have completed secondary school must know what European integration means, and they must have acquired the competences which enable them to become constructive European citizens. It is important to prepare students for mobility;
- 'European dimension' means that teachers and students are aware of their shared European cultural foundations and within that the rich diversity of nations and regions. (This includes the whole of Europe, including migrant cultures);

- Mobility should be an integral part of the initial and in-service training of teachers;
- Mobility may be implemented not only in the framework of courses, but also through practical activities, networking, operating exchange programmes;
- Successful mobility requires the support of national policies.
- The lack of language proficiency and the recognition of mobility are the most frequent obstacles.

The framework for the quality of teachers' and trainers' competences and qualifications should be in conformity with the general framework of qualifications to be developed.

#### 2.4. Wider processes:

##### 2.4.1. The Bologna process

- Teacher education is part of university education;
- Greater emphasis on the research on teachers and school education (could be inserted into the European Research Area)<sup>8</sup>;
- Introduction of three-cycle training and credit system;
- Set of requirements is needed concerning the output of training programmes;
- Introduction of an external quality assurance system created on the basis of criteria and methods adopted through mutual agreement;
- Introduction of a lifelong learning based approach in higher education.

##### 2.4.2. The Copenhagen Declaration

One of the main motifs of the Copenhagen Declaration is to identify the learning and in-service training needs of teachers and trainers working in vocational education and training. Within the framework of Lifelong Learning, the Declaration deals with issues concerning facilitators (teachers, trainers, mentors, tutors). These issues are also addressed by policy initiatives at European level which are meant to facilitate the setting up of the following frameworks:

- a framework for the transparency of vocational qualifications;
- a European framework for the assessment of non-formal and informal learning;
- a framework for quality assurance in vocational education and training;
- a European system of credit transfer in vocational education and training.

The above frameworks provide an indication for vocational education and training on the type of policy measures that are needed to operationalise a quality assurance system of teacher and trainer competences and qualifications.

The sub-group responsible for quality assurance has begun to develop the common criteria and methods that may serve as a basis for decision makers to identify the learning and in-service training needs of teachers and trainers working in vocational education and training. The working group applies a quality analysis and control system developed earlier at European level to case studies. This way it tries to formulate key questions which may help decision makers

<sup>8</sup> The European Research Area was established in January 2000 to help organising research at the European and national levels more efficiently and to facilitate innovation and convergence.

identify the learning and in-service training needs of teachers. The key questions concern planning, implementation and evaluation alike. Later, the sub-group will use these questions as a basis to collect examples of good practice from various countries, and to make statements at two levels:

- Common quality criteria for quality assurance: aspects and factors appearing in the good practices and experiences of the different Member States;
- Contextual quality criteria assurance: aspects appearing in specific contexts and situations only.

The common quality criteria applied in the review of good practices will provide answers to the special questions cutting across all systems of vocational education and training, and will help teachers and trainers recognise their learning and development needs. This system and way of thinking may be extended to teachers and trainers working in fields other than vocational education and training.

##### 2.4.3. Principles of the continuous development of teachers and trainers:

- Practical training with a mentor following initial training, in-service training;
- The teaching staff and the school, as an institution, may also be developed, but it requires the creation of a support system;
- Need for teachers' self-reflection: teachers should be able to decide themselves what type of training they need;
- In-service training should be interpreted in a holistic manner: successful teachers and trainers require more than purely professional in-service training in their careers.

The references and principles needed for the creation of a framework for the quality of teachers' and trainers' competences and qualifications must take into account the requirements of society concerning the teacher's role and the educational and training system.

### 3. Development of indicators – improving the quality of teacher education

It is essential to develop a set of indicators to make the performance of the various countries in terms of the quality of teacher and trainer education comparable.

The sub-group has proposed the following indicators – in addition to the existing EU and OECD indicators – for measuring the quality of teacher and trainer education throughout their professional life:<sup>9</sup>

- level of satisfaction with professional development programmes
- percentage of teachers and trainers participating in continuous professional development / training

<sup>9</sup> In the framework of the detailed work programme adopted to achieve the Lisbon objectives, the EU identified 29 indicators. Of these, the three indicators related to teacher education address the issues of teacher shortage and overproduction only, and fail to cover the quality and content of teaching. The OECD indicators (in: *Education at a glance* 2003) are mostly for measuring the types of the initial and in-service training of teachers.

- proportion of teachers and trainers with different levels of qualification
- level of investment into the training of teachers and trainers.

The sub-group developed a short term strategy and a mid-term strategy for indicator development.

The short term strategy (less than one year) includes, on the one hand, the implementation of mapping and peer learning exercises concerning the use of indicators of the different nations in professional development, and the collection of good practices which may be used at European level and, on the other hand, the short term strategy contemplates research to explore the relationships of the four proposed indicators. This would also be the first step towards a conceptual framework where all the indicators pertaining to this subject would be defined within a single system.

The medium term strategy (2 to 3 years) includes adding an optional teacher component to the year 2006 PISA survey. The teacher component would be based on the thorough analysis of the literature on teaching and teacher effectiveness, and thus modify the questionnaire for students. As another component, the strategy would include a Eurydice survey to examine the existing or envisaged quality assurance systems of the Member States concerning teacher and trainer education.

The main goal of further research on indicators is to examine, beyond the statistical information, the factors which influence the quality of students' learning experiences.

*Nóra Milotay*

### **Activities of Working Group B1 on Key Competences**

The Lisbon European Council in 2000 identified the future objectives to be achieved by educational and training systems by 2010, and outlined five key basic competences required for a knowledge based society. These were the following: ICT skills, competences in science and technology, a foreign language skills, entrepreneurship and interpersonal competences. It also recalled the need for enhancing the European dimension in education and through that ensuring its more powerful presence in the basic skills of young people.

In September 2001, the Commission set up a working group on key competences under the "Education and Training 2010" work programme. As the original name "Working group on Basic skills, foreign language teaching and entrepreneurship" indicated, the working group was tasked with interpreting the wide range of fundamental skills to be acquired at school. Eventually, a separate working group was formed to deal with the tasks relating to foreign language learning, and this working group addressed fundamental skills and entrepreneurship only. The tasks were organised around a very important goal: within

the framework of the thematic work "Developing skills for the knowledge based society", as part of the EU work programme until 2010, the working group had to identify the key competences needed for the knowledge based societies of the Member States – and the future accession countries.

In 2003, the representatives of the states acceding on 1 May 2004 joined the working group. In the same way as other candidate countries, Hungary could join in the activities of the committee in January 2003.

In what followed, the work was based on the assumption that at the moment the European Union does not have a common position on what basic skills refer to. Traditionally, they referred to numeracy and literacy skills. It is obvious, however, that schools must provide more than that to the generations growing up in the information society to help children develop a wider range of skills. In essence, it means that the thinking about fundamental skills and abilities to be developed in the framework of public education should be renewed, and this could serve as a common basis for the renewal of education in Europe in the future. It has become obvious that the integrated European processes of higher education, labour market and vocational education and training and adult education cannot be successful, unless the future citizens of Europe possess as soon as possible the necessary skills and abilities at the required level.

The operations of the working group were divided into three phases. The main pillar of the first phase was to select and interpret basic skills, and prepare an interim report (2003). The collection of good practices from the participating countries was built upon this. In the second phase, the previously identified good practices of the Member States were examined, mutual study visits were organised, and the experiences were analysed. Finally, the third phase included the synthesis of the experiences from the study visits, the integration of the opinions of external experts and the preparation of the year 2004 report. In the period preceding the activities of the working group, the Commission analysed key competences on various levels (Eurydice, 2002). This document built upon the earlier work done on other international forums and in other international organisations, but it added relatively few new and independent elements to the thinking about competences. Prior to all these, various international organisations and research teams identified and defined the concepts of "basic skills" or "key competences". An excellent example to this is the De-Se-Co Programme (Definitions and Selection of Competences: Theoretical and Conceptual Foundations) launched in an OECD framework, which used the results of the activities of the working group set up in an OECD framework to identify and define key competences (Rychen és Salganik, 2001), and included references to the preparatory works of OECD PISA surveys. Eventually, the report of the EU working group described eight key competences, with subtle differences compared to the original one. Thus the skills and abilities defined are communication in the mother tongue, communication in a foreign language, mathematical literacy and basic competences in science and technology, ICT skills, learning-to-learn, interpersonal and civic competences, entrepreneurship and cultural awareness.

By September 2004, the working group named the basic skills, formulated short definitions for them and defined the knowledge, activities and attitudes required to acquire the various basic skills. Successful model practices which may be linked to the development of these competences were selected from the good practices presented by the Member States.

The working group addressed the relationships of key competences and the European dimension, the skills relating to employment and social inclusion in subcommittees. The **subcommittee for the European dimension** had three tasks: (a) it created a link between the eight areas of competences and the set of concepts relating to the European dimension, (b) broke down the given areas to the major elements of knowledge, skills and attitudes, and (c) interpreted the European dimension in relation to the learning environment, learner / teacher mobility and curricula.

The **subcommittee for social cohesion** has established that the conditions of successful integration include, in addition to education, provision for the special needs and therapeutic provision, co-operation with parents, family members and the helpers of the disabled. In addition, the institutional and physical conditions should be such that do not violate human dignity. The creation and development of basic skills can be achieved through both individualised learning and in the various forms of integrated education. The integration of people with disabilities is essential not only for those affected, but also for the mainstream society. Democratic citizenship, an attitude based on inclusion, teaching human rights and solidarity are values children should become familiar with already at school.

As there is a close relationship between education and training and employability, the whole process of acquiring key competences and the possible areas of support are of key importance also in the employment strategy of the Community. All these are reflected by the **good practices** collected by the Commission from the Member States, as they can be thematically grouped, on the one hand, to support adult education (including in particular adult literacy and numeracy) in multiply disadvantaged groups. On the other hand, many countries have launched programmes to strengthen learning-to-learn skills, to support interpersonal and civic competences, and to develop the skills classified under "cultural awareness", which help the receiving and processing of cultural experiences, to give priority to supporting the integration of disadvantaged groups at risk of exclusion in the labour market. In early 2004, the working group identified key areas for the members to demonstrate good practices. These may be grouped around three themes: ensuring the acquisition of adequate basic skills for all through developing reading competences; to help transition from one educational level to the other; and to support the strengthening of key competences in the training of disadvantaged young people and the active age group.

The working group has formulated the following **policy recommendations** for the decision makers of the Member States: As a priority task, it is necessary to promote the integration of the eight key competences into the national curricu-

la, through the co-operation of policy makers, teachers, researchers and teacher training institutions, informing parents of the importance of key competences with a view to gaining their support for these efforts. Another priority area is to promote the co-operation of educational actors, to reveal the problems of special target groups and disseminate the results, and to mainstream the development of key competences into all educational, employment and social community support programmes. Another priority task is to develop learning-to-learn indicators, and to continuously apply assessment and evaluation systems to the acquisition of competences.

Sándor Brassói

### Activities of Working Group B2 on Languages

The EU expert working group was set up in July 2002. As other candidate countries, Hungary could join the working group in November 2002. The working group's activities covered the following main areas:

#### **1. Helping the preparation of an EU Action Plan for language teaching and monitoring its implementation**

The members of the committee contributed to the preparation of the Action Plan "Promoting Language Learning and Linguistic Diversity" for the period 2004-2006 drawn up by the European Commission in July 2003 by discussing the consultation document for the preparation of the Action Plan and disseminating it in the countries concerned.

#### **2. Discussing the possibility of developing four indicators**

European indicator of language competence: measuring four skills in two or more foreign languages, at various levels of proficiency at the end of compulsory education, based on the Common European Framework of Reference.

The Barcelona European Council requested the European Commission to create an indicator of language competence to measure progress towards achieving the objective whereby all citizens of the European Union should speak at least two Community languages besides their mother tongue.

In the initial stage of developing the indicator, emphasis would be placed on three languages (English, French, German) and two skills (speaking and listening skills).

*Indicator for measuring the quality of teacher training:* the percentage of language teachers who have participated in mobility programmes as part of their initial training or in-service training.

*Lifelong learning indicator:* This indicator would provide information on what percentage of the adult population is involved in language learning.

*Early language learning indicator:* This indicator would measure language skills not directly, but through linguistic awareness and motivation.

### **3. Collecting and studying Good Practices**

The working group on languages identified the following thematic areas for exchanging good practices: 1. early language learning, 2. language learning in secondary education, 3. linguistic diversity in the educational and training systems, 4. lifelong language learning, 5. training of teachers of foreign languages, 6. the use of ICT in language learning, 7. language learning in adult education, 8. language learning in vocational education and training, 9. language learning for learners with special educational needs, 10. minority and migrant languages.

The delegates in the committee submitted 170 descriptions of good practices for the above themes. These may provide valuable help to mutual learning from each others' experiences.

### **4. Formulating recommendations for decision makers**

Based on the good practices collected by the representatives of the Member States in 2003 and the over 300 innovative projects in the database of the European Languages Label and the recent studies prepared at the request of the European Commission, the working group formulated the following recommendations for national decision-makers and authorities:

#### *A) Policy recommendations*

National, regional and local authorities should make substantial and continuous efforts to promote an awareness of the paramount importance of linguistic diversity.

The competent authorities should ensure that mainstream education and training policies include provision for teaching regional, minority and migrant and neighbouring languages.

Each country should have a set of carefully formulated and clearly stated objectives for language teaching at the various stages of the education system, ranging from encouraging mutual respect and language awareness to acquisition of specific linguistic skills. The starting age for learning languages and the methodologies to be adopted should be decided in the light of these objectives.

To ensure continuity of linguistic choice and of methodology in the transition from primary to secondary school, national, regional and local authorities should remove the structural obstacles and realise co-operation between teachers and schools.

National authorities should encourage a generalisation of content and language integrated learning (CLIL) by defining the standards of teacher qualification and supporting the preparation of appropriate teaching materials.

National authorities should establish transparent evaluation systems based on the Common European Framework of Reference for Languages.

The education authorities should introduce mentoring systems to assist language teachers at the beginning of their career.

The education authorities of the participating countries should introduce or extend the schemes for dual or multiple recognition of language teaching qualifications.

#### *B) Recommendations for the local or classroom level*

Language diversity could greatly benefit from the establishment of cross-border regional links between education and training systems, schools, practitioners.

To foster 'learning to learn' skills and to enable people to keep developing their linguistic competencies after leaving school, a strong element of autonomous learning should be introduced in languages courses. Learners should be trained to use autonomous learning tools as well as instruments which support the monitoring and self-assessment of the learning process (e.g. DIALANG, or the European Language Portfolio)

Language resource centres provide a good opportunity to combine autonomous and lifelong language learning, as they can cater for a great variety of target groups and can be adapted to individual needs and circumstances. Their availability should be increased.

To give students a feeling of the economic value of foreign languages, visible links with the world of work should be established or reinforced.

The introduction of information, communications and multimedia technologies as part of a coherent methodological and didactic framework can prove a valuable asset in language teaching and learning. Language teachers should be trained in the use of these technologies.

A language-friendly environment including sufficient language learning opportunities should be provided by exploiting the potential of the mass media and of public buildings and facilities.

In the first half of 2004, the working group set the objective of investigating (with the help of a questionnaire) the progress made in the Member States towards implementing the eight national level recommendations.

In general, it can be stated that the role of languages in educational policy has been reconsidered, concrete objectives have been set, and curricula have been revised.

The promotion of linguistic diversity differs from one country to another: while certain countries focus on learning English, others place emphasis on the promotion of other languages as well.

In the future, additional efforts need to be made to raise the awareness of the importance of language learning among parents and in society alike, as it may greatly help the implementation of the two recommendations on linguistic diversity and on speaking 2 foreign languages beyond the mother tongue.

Ensuring the continuity of linguistic choice in the transition from primary school to secondary school is a problem in several countries.

The initiatives to introduce content and language integrated learning, or the propagation thereof shows a varied picture in the various countries.

The international situation is the best in the field of assessment: the wide ranging acceptance of the Common European Framework of Reference can be a great contribution to the transparency of assessment systems used in language teaching in European countries.

The use of the mentoring system is not a problem in most countries; however, the recognition of language teacher's degrees is in general not widespread, and it should be encouraged.

The shortage of teachers with adequate qualifications is a problem in several fields: thus, the fact that there are not enough teachers of less popular languages, impedes the realisation of linguistic diversity, and the shortage of qualified teachers has an adverse effect on the spreading of content and language integrated learning, the early start of language teaching at primary school and the more extensive use of language teaching in VET.

The working group regards the further refining and specification of the international level policy recommendations as one of its tasks.

*Krisztina Kolosy Bene*

### **Activities of Working Group C on Information and Communication Technologies in Education and Training**

Hungary could join in the activities of the EU working group on ICT as of the end of 2002. The activities of the working group are aimed to propagate the efficient use of information and communication technologies in education and training. The working group focused on public education / vocational education and the on-line and off-line use of ICT devices. Among the national examples of 'good policy practice', ICT projects for teacher training as well as school based and out of school projects on ICT use had to be provided. Since 2004, the working group has been paying more attention to the investigation of ICT applications in vocational education and training.

The following issues have appeared on the agenda of Group C so far:

#### **1. Definition of a "good ICT policy"**

For the identification of good professional practices, the working group surveyed the results of international research done so far, and the results thereof. The analysis was based exclusively on the use of ICT for educational purposes, while other administrative and organisational applications were not investigated. Furthermore, the working group defined what criteria a good ICT policy should meet, and developed a number of general indicators which may be internationally disseminated.

#### **2. Overview of work relating to benchmarks (OECD, EIA, PISA, EU)**

The working group provided a professional evaluation and formulated recommendations with respect to the desired benchmarks. For the identification of indicators, the benchmarks defined within the framework of the e-Learning and e-Europe programmes were taken into account. The group issued a critical opinion on the EUROSTAT "Survey on ICT Usage by Households and by Individuals"

to be conducted in EU countries in 2005. Here, in addition to the frequency and technical parameters of use, quantitative indicators of the use of ICT tools and the components of ICT competence were proposed to be included in the aspects of the survey.

#### **3. Collection of good ICT policies practices**

The members of the working group provided detailed descriptions of over 100 good policies and pedagogical practices. These are included in the approx. 300-page policy resource book published in English in September 2003. The Hungarian delegate presented to the expert group 2 good policy practices (Sulinet – Digital Knowledge Base, and the national framework for teacher (in-service) training) and 3 good pedagogical practices (development and testing of curricula enhanced with ICT for certain subjects taught in public education, the Hungarian Telehouse Movement, and the OECD research based project in-service teacher training in the cross-curricular use of ICT).

#### **4. Analysis of good ICT policies**

In the examination of policy practices, the experts drew attention to the problematic points and challenges relating to the extensive use of ICT in education, such as motivating key actors, developing strategies for spreading the use of ICT in education and training, rapid obsolescence of hardware and software in new forms of learning, handling the changes in the relationship between educational institutions and their environment, opening up the educational institutions for the wider community, acquisition of new teacher roles, development of new curricula, creation of new frameworks for assessment, provision of services to support the use of ICT for student learning and teaching purposes, and last but not least, the development of new educational indicators.

#### **5. Policy recommendations of Working Group C**

Integrating ICT policies and strategies into long term educational objectives: In the development of ICT strategies, special attention should be given to the use of ICT for educational purposes to help the implementation of the three main aspects defined by the European Council as long term objectives of education (individual development, development of the society, and development of the economy by ensuring a skilled labour force). The use of ICT in education must be integrated into the strategies of lifelong learning.

Provision of support services for educational actors: The Member States must ensure technical and educational support services alike. These include the training of teachers, teacher trainers, educationalists, counselling and guidance for students, and consultation in the field of new tools for assessment and evaluation. Furthermore, it would be necessary to provide support to projects that help learning outside the classroom, i.e. libraries and multimedia centres for students.

Preparing educational actors for the changes that are concomitant with the application of ICT in education and training: The extensive use of ICT in educa-

tion largely depends on the qualification of teachers. Therefore, providing training to teachers in this field is a priority task. Teachers should be familiar with the possibilities of integrating ICT in their daily pedagogical practice.

Encouraging research, definition of new indicators, providing access to research findings for all: It would be important to provide support for research on the impacts of ICT on the teaching / learning process, and develop teacher and student performance indicators and disseminate good practices and research findings.

In the first six months of 2004, the working group collected examples of good practice for the four recommendations outlined above, which would also demonstrate the limitations of the implementation of these recommendations. Reports were prepared for the four themes (A group composed of members from five countries worked on recommendation 3, which related to teacher education, under the direction of the Hungarian delegate). Some of the examples were submitted by the national representatives earlier, while others were identified to support the recommendations. This new, structured collection of good practices (*Mapping and synthesis of recommendations*) has not been published yet. The proposal package implying policy decisions and presenting these national examples will be submitted to the managers of the "Education and Training 2010" process at the working group meeting of November 2004.

In these six months, the group also gave considerable attention to the issue of indicators, which are meant to be used for "ranking" countries in terms of their achievements in the field of ICT in education. Two meetings addressed international surveys which measure, similarly to EU agencies, the educational use of IT in Europe. The document entitles "*Group C Report Follow-up on Recommendations Synthesis of contributions on Indicators, April 22th, 2004*" will be published later this year. The essence of this document is that ICT should not be considered as an annex or an addition to educational policies. EU countries should develop educational and learning objectives in parallel with educational ICT applications in their national policy documents. This way, the former would be integrated into research and development programmes not as "added extras", but as important facilitators of national objectives concerning e.g. equal opportunities, competence development or individual skills and abilities assessment.

Andrea Kárpáti

### **Activities of Working Group D on Increasing Recruitment to Science and Technology**

In a competitive, knowledge based society, development in the field of science and technology is of key importance. If Europe wants to retain, and even improve its position in the world, it must pay much greater attention to ensur-

ing that young people are sufficiently interested in mathematics, science and technology, and careers where the application of such knowledge is necessary an increasing number of graduates seek employment in science and research after graduating from higher education, and it should be also considered as important that they are satisfied with their career pathways and prospects to an extent which prevents them from abandoning their career.

In order to better implement the objectives of the work programme, the ministers responsible for education and science in EU countries adopted the following benchmark in May 2003:

"By 2010, the number of graduates in the field of mathematics, science and technology must be increased by at least 15% on the 2000 level by reducing gender imbalance at the same time".

The EU working group addressing this issue covered the following main points:

- Sociological aspects of mathematics, science and technology
- Developing science subjects
- Career guidance / carrier opportunities available in this field
- In-service teacher training

The tasks of the working group include the exploration of innovative, successful practices relating to the teaching of mathematics, science and technology, and designing joint research activities is also considered important. Based on the priorities defined by the working group, the Member States sent the Commission descriptions of projects that are deemed to represent good practices. The Hungarian delegate presented educational journals for students, national competitions and the work of the National Association of Students Engaged in Research, as examples of good practice.

The issue of indicators received considerable attention in the working group. As a result of this work, the working document supplementing the interim report adopted by the Education Council in February 2004 contains the following four indicators:

- Proportion of students enrolled in courses in mathematics, science and technology in higher education within the total number of students in higher education;
- Proportion of graduates in the fields of mathematics, science and technology within the total number of graduates;
- Total number of graduates in the fields of mathematics, science and technology (in thousands);
- Number of graduates in the fields of mathematics, science and technology within the 20-29 age group per 1000 graduates

The working group issued a questionnaire to explore the initial parameters of the countries with respect to the recommendations formulated in the interim report.



In the interim report published in 2003, the working group proposes to turn the interest and attention of children and young people in general to these fields.

**Five main factors** have been identified to achieve the above:

- School (pupils' interest may be raised through the teacher's personality, the curriculum and the extracurricular activities)
- Parents (their opinions and attitude represent the opinion of society for children)
- Media (television, press, Internet)
- Special career guidance and career centres
- Labour market forecasts and provision of information

The tasks of the working group included the exploration of the partnerships of schools, universities, social partners and economic actors, and the collection of good practices undertaken in connection with this.

A subgroup was set up within the committee to formulate recommendations in conjunction with "the co-operation of schools, universities, research institutes, businesses, parents' associations and other actors".

*Radnai Gyuláné Dr. Julianna Szendrei*

### **Activities of Working Group E on Making Best use of Resources**

The Lisbon conclusions urge the significant increase of per capita human resources, pointing out that the future of the European economy largely depends on the skills of its citizens. These skills must be therefore continuously updated, and such updating is a characteristic of knowledge-based societies. It is also important for the educational and training sector to utilise and distribute its scarce financial resources as effectively as possible and require top quality products and services in return.

**Therefore, the key tasks under this objective are the following:**

- Investments in human resources must be increased, while ensuring the equitable and efficient distribution of the available instruments to facilitate the access to education for all, and to increase the standard of education.
- Support must be provided to the development of compatible quality assurance systems while maintaining the respect for European diversity.
- Possibilities must be created for public-private partnerships.

**The task of the working group is to make a proposal for the following:**

- more resources for education;
- efficient resource utilisation by ensuring equal opportunities.

The working group accomplishes this task mainly by collecting and evaluating good policies at the national level and by providing data to the Commission with a view to exploring the national systems for financing education.

### **The proposals drawn up by the working group**

In the field of education and training, the working group believes that the involvement of the private sector would provide an opportunity for increasing resources. Non-governmental resources mean firstly the business/investment sector and secondly the users / beneficiaries of services provided by the educational and training sector, of which the latter is crucially important.

The working group has drawn up several proposals for the mobilisation of non-governmental resources. It must be emphasised that the proposals detailed below are still subject to debate and are in the process of evolution. If they are finalised, they may be systemised into a toolkit, which the Member states will be able to select from, according to their own needs and considerations – provided that they are considered adequate.

In the course of implementing the measures proposed, it is important to avoid, or adequately handle, the pressure to choose between quality vs. efficiency and equal opportunities vs. quality.

**The proposals/recommendations for higher education are the following:**

- Enabling higher education institutions to charge tuition fees or other charges for training, examinations, and administration.
- Providing income-dependent loans to students which must be repaid after graduation, when the students' income has reached a given threshold. The obligation to pay tuition fee usually appears as a condition to providing income-dependent student loans.
- Introducing a "graduate tax". The graduate tax should be conceived as supplementary personal income tax to be paid by those graduates who have received grants during their studies;
- Research contracts between higher education institutions and the private sector, enabling commercial activities;
- Provision of non-academic activities by the private sector, mainly through outsourcing and PPP.

**Proposals for vocational education and training:**

- Concluding student contracts for a specified period, which is longer than the training period. On the one hand, such contracts would provide a guarantee for apprentices that the training will actually take place, and the apprentice will have an income during that period. On the other hand, they will prevent recently trained labour from being won over by another actor in the given market before the cost of training has been repaid.
- Providing income-dependent loans to students during the apprenticeship period.
- Repayment clauses are an alternative to student contracts. They stipulate that employees must reimburse a certain percentage of the employer's training costs, if they leave their employer before the expiry of a certain period following their training.
- Drawing up collective funding agreements between the company, the industry/sector and the social partners to prevent companies from employ-

ing labour trained using the practical training facilities and funds of another company within the same industry. (Resolving the 'prison' dilemma)

- Advertising training opportunities.

**The following proposals have been made to help the effective utilisation of the available resources:**

*From the perspective of the institutions:*

- Organisational changes, which mean the delegation of decision making to lower levels (greater autonomy to local management, e.g. greater freedom to principals in the remuneration of teachers), decentralisation, or the centralisation of performance assessment.
- Reforming the input of schools, which may include the reduction of the student-teacher ratio or the reduction of class sizes.
- Co-ordination between the public and the private sector in the field of dual education – i.e. combining school based education with training at companies.
- Provision of academic and non-academic services by the private sector.
- Taxation policy: reducing the tax burden may be an effective contribution to educational and training programmes.
- Removing the present difficulties associated to loans.

*Changing the incentive system:*

- Public financing coupled with a free choice of school. That requires the transferability of per capita subsidy together with the students;
- Introducing tuition fees in higher education, which would create equal opportunities according to the Commission. A condition to realising this proposal is the existence of income-dependent student loans;
- Linking teacher salaries to student performance;
- Rewarding teachers subject to the quality of teachers;
- Teacher assessment: the result of the performance assessment of teachers correlates with that of the students;
- System of school accountability based on standardised tests.

**Relation to other working groups**

The activities of the working group may be described as horizontal; the group works in a close relationship with all the other working groups, including the one on indicators.

In 2003, the working group on indicators proposed the use of 5 indicators, which are the following:

- public expenditure on education and training, as a percentage of the GDP;
- non-governmental expenditure on educational institutions, as a percentage of the GDP;
- investment of enterprises in vocational education and training outside the mainstream school system, as a percentage of labour costs;
- total expenditure per student / pupil by level of education;

- expenditure per student of the individual institutions, as a percentage of the GDP.

As the above indicators only cover the input, they do not fully comply with the requirement of efficiency, so the EU working group on best resource utilisation proposed the consideration of further indicators. These are:

- cost per graduate,
- graduate unemployment rate,
- the PISA results as compared to aggregate expenditure,
- drop-out rate,
- proportion of teaching staff compared to the total number of educational employees.

*Attila Kotán–Tamás Móri*

**Activities of Working Group F on Mobility and European Co-operation**

The working group started operating in early 2003, and set a dual purpose for itself:

- taking a snapshot of the current state of mobility through the national reports of the various countries,
- identifying model solutions through the dissemination of good practices.

In June 2003, the national reports on mobility were completed. They were based on two Community documents: the Recommendation of the European Parliament and the Council on mobility and the Mobility Action Plan. The reports had to present the state of mobility according to the aspects defined in these documents, and describe the mobility measures taken at the national level between 1 January 2001 and 31 December 2002.

The national reports served as a basis for an analysis published by the Commission in January 2004<sup>10</sup>, whereby the following urgent reforms were needed to increase mobility:

- identifying national mobility objectives / strategies, regular monitoring,
- removing the existing legal obstacles,
- developing a European marketing strategy for the global promotion of European study opportunities,
- funding by the Member States in addition to Community funding,
- improving the quality of mobility, with special emphasis on the adequate preparation of the beneficiaries,
- recognising the study periods spent abroad, and the acquired knowledge at sending country,
- increasing the mobility of language learners and trainers,

<sup>10</sup> Report on the follow-up to the Recommendation of the European Parliament and the Council of 10 July 2001 on mobility within the Community of students, persons undergoing training, volunteers and teachers and trainers. COM(2004)21final

- increasing the mobility of teachers,
- increasing the mobility of those participating in vocational education and training.

Based on the proposals based on the work done in 2003, the working group's work programme was the following in 2004:

#### **2004/1st half**

##### ***Improving the quality of mobility***

Mobility is a process rather than a product. It is part of the learning process, and this makes the provision of high quality mobility necessary, which includes the adequate preparation and monitoring of mobility and the recognition of the period of mobility. In this field, considerable progress has been made as the international working group prepared the "Quality Charter for Educational Mobility" document. In accordance with the authors' intention, the charter is a reference document describing the main quality principles. Its use is not obligatory, as it is a recommendation which may be used on a voluntary basis. This approach is reinforced by the "universal" nature of the document, which enables the adaptability of the quality criteria to the properties of different mobility actions and programmes, as well as their amendment or modification. The charter is supplemented with a summary of the best mobility initiatives and examples in terms of quality. According to the work plan, the working group will submit the final version of the charter to the Commission in the second half of 2004, the use of which will be recommended for the Member States as of 2005.

##### ***Improving access to mobility***

According to the working group, improving access to mobility is of key importance. Access is best in higher education, as far as both students and teachers are concerned. Those who participate in vocational education and training, SMEs, socially disadvantaged persons and persons with disabilities are in a much worse situation, as their participation in mobility is impeded by a number of factors. Following the analysis of the present situation, the working group prepared a report in collaboration with an external expert elaborating on the desired actions for improving access to mobility. That document provides an overview of the main factors that impede mobility, and proposes specific action to remove them:

- provision of counselling, guidance and training in a form tailored to the needs of the target group;
- making the conditions of mobility actions/programmes more flexible and favourable;
- providing easier access to information,
- strengthening the social and communication skills that are required for participation in mobility programmes, and recognising the competences acquired earlier;

- developing new, more flexible support systems (with the involvement of the affected target groups), and overcoming the difficulties caused by the indirect costs of mobility (e.g. substitution charges, dual taxation, social security, etc.);
- examination of policies at the national and EU levels, identifying the deficiencies which may impede mobility, and taking the right measures.

##### ***Identifying mobility indicators***

In the course of the work, all Member States faced the problem that the available statistics were insufficient, and even those available did not allow comparisons as they had been processed based on different indicators. Therefore, the use of standard indicators would be important. The indicators proposed by the Standing Group on Indicators for measuring mobility are the following:

- sending and receiving teachers and trainers under the Socrates and Leonardo Programmes;
- sending and receiving Erasmus students and Leonardo trainees;
- proportion of students enrolled in higher education programmes;
- proportion of citizens participating in higher education abroad.

#### **2004/2nd half**

##### ***Developing national mobility strategies***

The working group wishes to include in its agenda the study of the methods that the various countries could use to further improve their national strategies and co-ordination structures for mobility in education. The objective of this study is to formulate specific recommendations by 2005.

##### ***Mobility of teachers and trainers***

The working group also wishes to study how mobility may become an integral part of the professional career of teachers and trainers, thus helping make the teaching and training careers more attractive and improving the quality of teaching. The objective of this study is to formulate specific recommendations by 2005.

The working group wishes to work on this subject in collaboration with Working Group A on teacher education and in-service training.

##### ***Collecting good practices in the above fields***

The objective is to define common principles and references to facilitate further work.

##### ***Removing legal and administrative obstacles***

The working group wishes to monitor the state of legal and administrative obstacles to mobility and the effectiveness of the actions taken to remove them. This field is gaining focus through the follow-up of the recommendation of the European Parliament and the Council on mobility and the Mobility Action Plan.

### **Identifying indicators for mobility**

Continuous joint work is done with the Standing Group on Indicators relating to the uniform handling of mobility statistics.

*Judit Hermándy-Berencz*

### **Activities of Working Group G on Education for Active Citizenship, Equal Opportunities and Social Cohesion**

Working group G was requested to address three issues for the second objective "Supporting active citizenship, equal opportunities and social cohesion": ensuring that the learning of democratic values and democratic participation by all school partners is effectively promoted, in order to prepare people for active citizenship; fully integrating equal opportunity considerations in the objectives and functioning of education and training; ensuring equal access to the acquisition of skills for the less privileged and motivating them to participate in learning. Its tasks include the creation of precise definitions; the description of the tasks relating to the fulfilment of the objective; collecting the possible means of achieving that; preparing policy recommendations, working out indicators and benchmarks, assessing and analysing the good policies and practices that exist in Europe in this field<sup>11</sup>.

According to the objective, it is important to make education and training equally accessible to all in Europe, with particular emphasis on helping the less advantaged groups, people with disabilities and learning difficulties. The less advantaged groups include the poor, those who live in rural or remote areas, and those who find it difficult to reconcile learning with their obligations at work or in the family, immigrants, members of minority groups, and the Roma. Those without the necessary school attainment to learn a trade needed in the labour market, or those without the skills required for learning as an adult also belong to this group.

The openness of educational and training systems and their ability, in terms of content and methodology, to include democratic thought and the necessary contents in school education has been for a long time an important condition for the functioning of European democratic societies. The Lisbon objectives require more than that, by including these ideas in the curricula of lifelong learning.

The working group is trying to find a solution to how European co-operation in the field of education may contribute to the beginning or continuation of achieving social cohesion in the various countries, and to help maintain the centuries-old European values. To this end, the working group prepared a list containing actions that all countries should consider:

Education for democratic citizenship should be an all-embracing approach in the process of lifelong learning. It should be taught not only in school based

education, but also in the education and training of young and older adults, as well as in adult education. It should be a process based on participation, and its location may be the civil society outside educational institutions, the family, the non-profit sector, the local entrepreneurs, the local agencies, the range of cultural and leisure activities, and the media.

Teaching the values of democratic citizenship is a significant factor in strengthening social inclusion, mutual understanding, dialogue among cultures and religions, and solidarity. For public employees, civil servants and the widest range of society, it is important to learn the importance of human rights, mutual understanding, tolerance and the feeling and demonstration of solidarity towards the needy. On the other hand, the acquisition of the knowledge required for active citizenship and the strengthening of self-advocacy skills are essential for the disadvantaged groups (e.g. immigrants, single parents, Roma people, and senior citizens).

The acceptance of gender equality and the dissemination of the related knowledge is of key importance for all groups of society.

Learning the values of democratic citizenship can be the best means of fighting against discrimination.

Social responsibility, business ethics, employee rights and obligations, employer rights and responsibilities, the rights of the unemployed are all necessary elements of education for citizenship.

These should be taught simultaneously, using the best theoretical and practical means. Therefore, modelling democratic citizenship and the opportunities for active participation is a recommendation of key importance for all democratically working schools, institutions and workplaces.

In several countries, considerable progress has been made at the level of theory and legislation. Unfortunately, there is often a divide between theory and practice. A change of the didactic mindset is needed to make education effective and credible.

A range of resources need to be involved: these educational contents should be available free of charge; the development of accreditation, authorisation procedures are needed for the various private or voluntary courses; model programmes need to be developed and disseminated; in the community, appropriate facilities should be provided for the local training of young pupils and older learners. The Roma and Sinti and the other minority groups, single mothers, the unemployed, emigrants and non-active citizens should be given preferential access. For them, the most important thing is to be aware of their rights.

A European centre needs to be established to enable the implementation of education for citizenship at all levels of education and training. The tasks of such a centre would include the dissemination of local developments, good practices, the distribution of teaching materials and training trainers.

<sup>11</sup> Objectives in education systems; Report 2004 on Working Group G Short Questionnaire; Active citizenship, equal opportunities and social cohesion; 08/08/2004); <http://www.om.hu/main.php?folderID=755&ctag=articlelist&iid=1&articleID=3022>

**Related concepts:**

**Due to their broad meaning, the committee provided definitions for a few concepts:**

*Citizenship skills:* the development / acquisition of skills, abilities and values enabling the working of democratic society at all levels, within formal education, as a separate subject or in cross-curricular form.

*Teaching human rights:* this is the basis of education for active citizenship. Teaching human rights has three separate aspects (human rights and freedoms, national and international instruments, regulations), pupils should be prepared for living in conformity with the respect of human rights (developing forms of behaviour, acquisition of skills), and they must be provided with an environment that is adequate to respecting human rights (environment, communication, procedures, attitude that comply with the requirements in practice).

*Political education:* enabling to understand, analyse and influence political decision making process affecting individuals / groups.

*Education for values:* one's own orientation of values, others' values and the importance of scales of values in public education.

*Education for peace:* preparation for peace, non-violence, understanding each other at international level, shared responsibility, mutual understanding, tolerance, peaceful settlement of conflicts.

*European values:* familiarity with European integration, Europe as a cultural unit, the common European future, the functioning of institutions, preparation for the role as an active European citizen.

*Global training:* learning situations and experiences which enable students to learn about the increasing complexity of the world, and orientation in global operations.

The Informal Council of Ministers of Education adopted at its meeting of 11-14 July 2004 in Rotterdam a document which contains the recommendations of the working group<sup>12</sup>. According to this, 2005 will be the Year of Citizenship through Education. The Ministers are convinced that this will ensure considerable publicity, and draw the stakeholders' attention to the importance of the matter.

The working group made separate statements concerning the lifelong learning of persons with disabilities. The opportunities of the disabled are well behind the mainstream opportunities, so providing support to them is a fundamental obligation. It is important to ensure that they receive financial support more rapidly, and the period of application and contracting should be shorter. They must be offered inclusive, integrated forms of education. The integration of people with disabilities is important not only for the disabled, but also for others, as inclusion and integrated education are the best means of strengthening solidarity in society. Special emphasis should be given to e-learning opportunities for these individuals.<sup>13</sup>

<sup>12</sup> Presidency conclusions on Citizenship education as part of the 'Lisbon agenda', www.om.hu

<sup>13</sup> Proposal for a decision of the European Parliament for the effective integration of ICT in education and training systems in Europe COM 2002 751, final, 19.12.2002.

Legislation must treat inclusive education and training as a priority. The participation of students with disabilities, their helpers and family members in making the decisions affecting their lives and education is particularly important. The staff of institutions providing education and training for disabled students should receive preparatory training at the beginning of programmes and on a continued basis. It is suggested that all development programmes targeting disabled people should eliminate age limits. For the disabled, the pathway from education to vocational training and then to employment should be made easier. In higher education, highly qualified counselling teams should provide support for disabled young people. Women with disabilities should receive enhanced support. A decentralised and appropriately flexible distribution of funds may increase effectiveness.

The European Constitutional Treaty, furthermore, underlines the importance of the fundamental values of respect of human dignity, respect between man and woman, liberty, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. Thus, the Treaty would offer a common platform for formulating shared educational objectives on citizenship education.

Judit Szira

### **Activities of Working Group H on Making Learning More Attractive and Strengthening Links to Working Life and Civil Society**

The activities of the working group are aimed to make a contribution to the Council decision adopted in the context of lifelong learning "Making a European Area of Lifelong Learning a Reality". Originally, Working Group H was to take an integrated approach in addressing, in particular, two of the 13 objectives adopted in March 2002 to follow up the Lisbon objectives. These are Objective 2.2 (making learning attractive) and Objective 3.1 (strengthening the relationship with the world of labour, research and society at large). In order to eliminate the overlaps between the issues addressed by the working groups, Objective 2.2 (open learning environment) was moved from the scope of the responsibilities of Working Group G to that of Working Group H at the beginning of 2004, thus integrating this issue with the issue of "flexible learning methods", which the Working Group had been discussing earlier on. As a result of this reallocation of tasks, the issues addressed by the Working Group now include the provision of career guidance and information relating to lifelong learning.

This issue is highly comprehensive, broad and horizontal, and it covers life as we experience it, far and wide, i.e. it embraces all fields of life.

In the spring of 2003, four priorities were identified as the main focus of the group's investigations:

- environment conducive to learning (for a new learning culture)
- flexibility of formal educational and training institutions and systems

- partnerships and creating space for co-operation
- assessment and recognition of knowledge and skills acquired through learning.

All of the four priorities are related to motivating the participants, increasing the pleasure of learning and the relevance thereof by contributing to social, civil and personal benefits and results. All of them facilitate the creation of so-called win-win situations, where all parties can be winners.

Although the Working Group deems important the role of school-like, formal educational and training institutions and systems in improving motivation for learning, and also increasing their flexibility it also concentrated considerable attention to the impact of non-formal and informal learning environments, and the possibilities of supporting lifelong and 'life-wide' learning in all fields of life.

As part of this effort, a proposal was made on the definition of Common European Principles for the assessment and recognition of skills acquired through non-formal and informal learning, and it was adopted by the Council and the Member States in May 2004. The purpose of defining such principles was to encourage the development of recognition systems by the Member States building upon the voluntary co-operation of Member states.

These Common European Principles intend to provide guidelines, and they are not compulsory for the Member States. The development of a common set of jointly defined European level principles was meant to enable the comparison of the various solutions applied by the Member States and their long-term recognition in the other Member States. Quality assurance and reliability have a key role. The assessment of the outcome of learning affects individual rights, and it is closely related to the promotion of lifelong learning, which is treated as a priority at the EU level.

Any of the stakeholders may be responsible for the assessment of skills acquired through non-formal learning (e.g. employer, training institution, employment centre, civil organisation), but only the competent authorities have a right to recognise the acquired skills, in accordance with the regulations of the Member States.

In 2003, the members of the Working Group took stock of the good practices followed in the above priority areas at Member State and sector levels, and having synthesised the learning from these, prepared an interim working group report by early 2004, which also contained recommendations.

Following the political adoption of the interim reports of the working groups, subgroups were formed in June 2004 within Working Group H to study the following issues in more detail:

- Learning-friendly environment and partnerships with various stakeholder groups
- Flexibility of educational and training institutions and systems, and an open learning environment (the issue taken over from Working Group G)
- Assessment and recognition of skills acquired through learning
- Indicators

For the study of issue 1, the Working Group decided to make a survey covering 31 countries on the existing partnerships working currently in the field of

education and training in the EU, the European Area and the accession countries, the participants thereof, the nature and impact of the partnerships and the practice of local learning centres. This survey will hopefully provide a basis for the identification of those well-functioning partnerships with the world of work, the civil sector and other social partners which, following further analysis, may be used as recommendations in the other countries or regions of the area, or may serve as a basis for further joint action at the EU level. The focus of the theme studied by group 2 was that the objective set by the European Council and the Commission, whereby European citizens of all ages must have access to lifelong learning by 2010, requires *inter alia* facilitating the openness of educational and training opportunities and creating a learning culture which is essential for citizens to understand the importance of learning from the point of view of their own success in life. For the propagation and realisation of such a learning culture, it is essential to put in place an extensive career guidance and information network which covers the individual stages of human life. Prior to that, common European approaches need to be developed to the criteria of the quality mechanisms of the guidance and information network, as well as the indicators and benchmarks used for measuring them.

The subgroup addressing issue 3 met in September 2004 to draw up a strategy for the period 2005-2007 based on the "Common European Principles for the assessment and evaluation of the outcomes of non-formal and informal learning" adopted by the Ministers of Education in May 2004. The strategy for the assessment of learning outcomes must reflect how the Common European Principles can be used as a starting point at the level of Member States, regions, sectors and businesses for the benefit of citizens, i.e. how to translate the principles into practice. We need instruments, actions and initiatives that can be effectively used at all levels. As a first specific step, a survey covering the whole of Europe is being made now to investigate to what extent the assessment of earlier knowledge and skills is used in the various Member States at the national and regional levels, or what methods are used in the various sectors, and how comparable or reliable the results of these are. The survey is made by ECOTEC, and is expected to be completed by the end of 2004. Hopefully, it will be a useful means of sharing experiences in the field of validation, in terms of peer learning. The analysis of the methods may serve as a basis for the methodology to train the professionals involved in the assessment of learning outcomes, the HR employees of companies and the professionals working in the information network relating to the designing of individual career models.

Validation will play an important role in vocational education and training, lifelong learning, entry into modular education, and in the fields of earning partial qualifications. Individuals have an interest in it, as it will help the promotion of their employability and social integration in both civil and social contexts. It is especially important for those who wish to integrate or reintegrate into education, training, the labour market or society. Companies also have an interest as the time and cost of in-service training may be reduced to the minimum by applying these methods.

The plans include the development of a European handbook or “user’s instructions” for applying the methods, the “European Handbook of Competence Assessment”.

The subgroup established a close contact with the technical working group on credit transfer in vocational education, the so-called Copenhagen process. On the model of the credit system used in higher education, this working group wishes to develop a credit transfer system for vocational education and training (European Credit Transfer System for Vocational Education and Training = *ECVET*). This means the elaboration of an *ECVET model* which will provide a tool for *converting the knowledge, skills and competences (KSC)* acquired by students through *mobility* upon transferring them from one national system to another, and to express it in credit points. The credit points are laid down in the memorandum of understanding between the sending and the receiving institution. With the development of the KSC system, the knowledge, skills and competences acquired in different countries will become comparable, irrespective of the location or method of their acquisition. The conversion mechanism must be compatible with the credit system used in higher education. The aim is to create a system which, on the long term, will serve not only the recognition of skills, knowledge and competences acquired in formal, school based vocational education, but the recognition of all competences required in non-formal ways through mobility. It is evident that such a practice-oriented system, which lends itself to so easy and extensive use, will make a genuine contribution to making learning more attractive.

Zsófia Lux

### Activities of the Standing Group on Indicators and Benchmarks

Hungary joined in the work of the Standing Group in February 2003.

The activities of the Standing Group include the following main tasks:

- Providing interpretations, opinions and additions to the groups of the Barcelona indicators
- Formulating specific proposals for the groups of indicators
- Developing missing (sets of) indicators
- Issuing opinions and discussing to the indicators proposed by the other working groups

#### 1. Current focal points of development in terms of content

In 2004, priority was given in the development of indicators to the joint study of the quality and cost-effectiveness of education. In the course of development, the scientific and documentation requirements are becoming increasingly demanding.

The main tasks in 2004 were: updating the structural framework of the 29 indicators selected to measure progress towards the achievement of the Lisbon

objectives; fine-tuning the analyses of these indicators; making proposals for new indicators; monitoring the structural indicators for education and training and the quality indicators developed by Eurydice, further improving the methodology and analytical frameworks of complex indicators; closer co-operation with other international organisations (e.g. OECD, IEA).

In 2004, the EU Standing Group on Indicators began its development work by identifying the areas where the designated indicators were not the most suitable for measuring progress towards the achievement of the Lisbon objectives. These were the following:

- Foreign language competences
- Improving learning skills
- Cost-effectiveness in education and training
- Teachers and trainers in continuous development
- Social background of students in higher education
- Social cohesion and active citizenship
- Equal opportunities
- ICT
- Mobility

The updating of the structural framework of the 29 indicators may result in the replacement of the already selected indicators with other indicators or in abandoning certain indicators.

#### 2. Updating the structural framework of the 29 indicators; fine-tuning the analyses of indicators; making proposals for new indicators

The most important reports and working documents prepared in 2004 with the involvement of the Standing Group on Indicators are the following:

- Updating the working document “Interim Report on the progress towards the common objectives in education and training. Indicators and Benchmarks”<sup>14</sup> for 2004
- The publication of the working document on benchmarks is scheduled for October 2004.
- The report on the new indicators will be submitted to the Council in October-November 2004.
- The working document on structural indicators and benchmarks will be completed by the end of 2004.

#### Indicator development for the various fields in 2004:

*Foreign language competences:* In January 2004, the Commission published a call for applications to find experts to develop indicators for linguistic competences.

*Improving learning skills:* The delegates of the Standing Group on Indicators first discussed this area in October 2003, in Frascati. The creation of a subgroup and an experimental survey to be launched in 2005 were raised as possible steps forward. In this area, the Standing Group of Indicators is not engaged in the current development work.

<sup>14</sup> Progress towards the common objectives in education and training. Indicators and benchmarks

*Cost-effectiveness of education and training:* In 2004, the main objective is to explore the indicators of efficiency used at the national level. The indicators proposed by Working Group E are the following:

- Direct number of teachers' teaching hours in compulsory education
- Expenditure per graduates
- Drop-out rate in higher education
- Average length of higher education studies.

The members of the Standing Group on Indicators believed that the proposed indicators were not the best indicators of efficiency. According to the proposal of the working group, a group of indicators should be defined to measure efficiency. The working group will continue the discussion of this issue based on statistics available.

*Proportion of teachers and trainers in continuous development:* a separate subgroup has been set up for this area composed of members from the Standing Group on Indicators and experts from the Working Group on teacher education and in-service training. The work will be closed by making a report for the two working groups.

*Social background of students in higher education:* At the meeting of May 2004, a discussion paper exploring national statistics was presented. From the results of the snapshot survey, the Commission drew the conclusion that the differences would make the harmonisation of statistics very difficult. The approaching EU-SILK could be a good chance for the newly developed questionnaire (for example, the study of the bottom 10% of the lowest and the top 10% of the highest income levels).

*Social cohesion and active citizenship:* A discussion paper will be presented at the next meeting of the Standing Group on Indicators.

*Equal opportunities:* The report on the conceptual background, selection and identification of equal opportunity indicators will be completed by the end of 2004. One chapter of the report will set out equal opportunity indicators, primarily in the form of a breakdown of existing indicators by genders.

*ICT:* A discussion paper has been made. This is the first one containing an attempt to integrate the ICT indicators with the 29 accepted indicators. The indicators relate to four areas: a) access to ICT; b) training teachers in the use of ICT in education; c) integrating ICT into the curriculum; d) learning outcomes arising from ICT use. Data are partially available for points b to d, but some data (e.g. the ones from PISA surveys) should be interpreted with great caution.

The Commission submits proposals to the Working Group on ICT concerning indicator development in three areas (motivation, access, use). The next step is to discuss ICT indicators within the expert group, and to make a decision on the desirable indicators from the policy perspective.

*Mobility:* In the second half of 2004, a separate working group was set up to develop indicators for mobility.

*Tünde Hagymásy*

### **I.3. RECOMMENDATIONS, PROPOSALS AND CONCLUSIONS OF EU WORKING GROUPS AND OTHER KEY DOCUMENTS USED IN THE COURSE OF WORK**

#### **Summaries on the Basis of EU Documents**

##### **Overview of Key Competences Defined by the Working Group on Basic Skills, Foreign Language Teaching and Entrepreneurship (Draft)**

**Communication in the mother tongue:** Communication is the ability to express and interpret thoughts, feelings and facts in both oral and written form (listening, speaking, reading and writing), and to interact in a linguistically appropriate way in the full range of societal contexts — work, home and leisure.

**Communication in a foreign language:** Communication in foreign languages broadly shares the main skill dimensions of communication in the mother tongue: it is based on the ability to understand, express and interpret thoughts, feelings and facts in both oral and written form (listening, speaking, reading and writing) in a wide range of societal contexts – work, home, leisure, education and training, according to one's wants and needs. Communication in foreign languages also calls for skills beyond those needed in the mother tongue, such as mediation and intercultural understanding. The degree of proficiency will vary between the four dimensions, between the different languages and according to an individual's linguistic environment and heritage.

**Mathematical literacy and basic competences in science and technology:** Mathematical literacy is the ability to use addition, subtraction, multiplication, division and ratios in mental and written computation to solve a range of problems in everyday situations. The emphasis is on process rather than output, on activity rather than knowledge. Science refers to the body of knowledge and methodology employed to explain the natural world. Technology is viewed as the application of that knowledge in order to modify the natural environment in response to perceived human wants or needs.

**ICT skills:** ICT skills comprise the use of multi-media technology to retrieve, store, create, present, sort and exchange information.

**Learning to learn:** 'Learning-to-learn' is defined as a foundation skill in Making a European Area of Lifelong Learning a Reality. The working group agreed upon the following definition: 'the disposition and ability to organise and regulate one's own learning, to manage one's time effectively; to solve problems; to acquire, process, evaluate and assimilate new knowledge; and to apply new knowledge and skills in a variety of contexts — at home and at work, in education and training.'



**Interpersonal and civic competences:** Interpersonal competences comprise all forms of behaviour that must be mastered in order for an individual to be able to participate in an efficient and constructive way in social life, and to resolve conflicts where necessary. Interpersonal skills are necessary for effective interaction on a one-to-one basis or in groups, and are deployed in both the public and private domains.

**Entrepreneurship:** Entrepreneurship has a passive and an active component: it comprises both the propensity to induce changes to one's own immediate environment, and the ability to welcome, support and adapt to innovation brought about by external factors. Entrepreneurship involves taking responsibility for one's actions, positive or negative, developing a strategic vision, setting objectives and meeting them, and being motivated to succeed.

**Cultural awareness:** The term 'cultural awareness' comprises an appreciation of popular culture and general social mores, as well as the ability to appreciate literature, art, music and other forms of creative expression.

### **Key Documents of the Working Group on Foreign Language Teaching**

#### **1) Action Plan "Promoting Language Learning and Linguistic Diversity"**

In July 2003, the European Commission prepared an Action Plan for the period 2004-2006 with a view to promoting language learning and linguistic diversity.

The Action Plan has two sections:

In Section I, the main political objectives are detailed under three main headings:

- Extending the benefits of lifelong language learning to all citizens (proposals for the full range of language teaching, from kindergarten to adult language learning), promoting the teaching of the widest range of languages
- Better language teaching (language teaching at school and in the classroom: language-friendly school, using ICT in language lessons, language teacher training, training special subject teachers in languages, assessment of language skills – European indicator of language competence)
- Building a language-friendly environment (promotion of regional, minority and migrant languages; building language-friendly communities: subtitled films, widespread access to the Internet, cross-border projects, establishing relationships between twin cities; publicity and expansion of language learning opportunities)

In Section II, specific, short term EU level actions are proposed for the period 2004-2006 with a view to supporting the activities of local, regional and national institutions. The 45 measures of the Action Plan include the preparation of EU level studies, the organisation of conferences, information campaigns and study

visits, the launching of new initiatives under the Socrates and Leonardo Programmes, and changing focus in these programmes.

In 2007, the Commission will review the outcomes of the activities at all levels, and will provide a report to the European Parliament and the Council.

The Member States are also required to make a report on their activities in the period 2004-2006 in 2007.

The Action Plan is available:

In Hungarian: at the website of the Ministry of Education: [www.om.hu](http://www.om.hu)

In English at the website: [http://europa.eu.int/comm/education/doc/official/keydoc/actlang/act\\_lang\\_en.pdf](http://europa.eu.int/comm/education/doc/official/keydoc/actlang/act_lang_en.pdf)

#### **2) Frame of Reference for European Language Teacher Education**

The European Commission has assigned the University of Southampton to develop by the autumn of 2004 a frame of reference under the Action Plan "Promoting Language Learning and Linguistic Diversity", for use in language teacher training and in-service training.

A study on this and other information are available at the following website: <http://www.lang.soton.ac.uk/profile/>

### **Proposals Made by the Working Group on Information and Communication Technologies in Education and Training Concerning Indicators**

The members of the group conducted a needs assessment based on the studies prepared in their own countries. They pointed out that the ICT development indicators concerning the standard and quantitative indices of technology (computer / student, computer with Internet access / school and student) are not suitable for characterising the level of development of IT in education. The group has proposed the following complex indicators:

- *Study of schools:* combining available technology and the criteria of access
- *Study of teachers:* indicators of access, e.g. Is preparation for the use of ICT in education included in teacher education and in-service training programmes?
- *Study of students:* emphasis is placed on application, in particular the use of ICT in education.

A few aspects for monitoring the above:

- Making teaching materials and presentations available at educational websites and in distance education environments

- Teacher-student and student-student communication supported by discussion forums and collaborative educational environments in education and in extracurricular activities
- *Co-operation*: dissemination of digital project work and products, and the discussion thereof on websites
- Reliable digital *examinations* providing reliable and immediate, detailed results

***The discussion of indicators highlighted the most innovation-intensive areas where significant changes are needed:***

- Learning management (software application aided student-student, student-teacher and teacher-teacher collaboration)
- Library and other information services
- Application of tutoring and other collaborative teaching methods
- Research on higher education methodology and regular studies of effectiveness

**Main Points of the Proposal Made by the Working Group on Increasing Recruitment to Mathematics, Science and Technology in July 2004**

Educational policies need to treat as a priority those educational theories which include significant practical applications and ensure active student participation.

It is debated whether technology should be taught to all or it should only be part of vocational training.

Currently, the given areas are only attractive for the more able; therefore action must be taken to make this knowledge available (possible to learn) and attractive for all.

There are very few initiatives for reducing gender imbalances, and the existing ones remain at local or regional levels and are of low volume – even in those areas where the difference is significant.

The role of teachers in the provision of career guidance is highly varied, and in most cases the quality is very low.

It is important to apply new teaching methods, and to assess practical work in addition to theoretical knowledge. Teachers need assistance in learning about the new methods, they need access to resource centres involved in the development of innovative pedagogical methods.

Beyond the curriculum, also partnerships, the relationships of universities and schools, and parents have an important role to play. There are many partnerships aimed at making certain subjects attractive to students, but there are only a few which help teachers adopt active and authentic teaching methods.

The obstacles identified include: shortage of human resources in higher education institutions, shortage of qualified staff in schools, and scarcity of

resources in educational institutions, coupled with the need for satisfying a potentially significant demand.

Parents have an important role in eliminating their children's preconceptions about these subjects.

It is important to offer a second chance to those who do not like these subjects.

It is necessary to increase the number of partnerships between universities and schools. Universities must have the appropriate resources (human resources and funds) to meet the needs of schools.

**Key Documents of the Working Group on Mobility and European Co-operation**

From the perspective of mobility for educational, training and research purposes, the documents of strategic value are the Mobility Action Plan<sup>15</sup> adopted in 2000 and the Recommendation of the European Parliament and the Council on mobility within the Community for students, persons undergoing training, volunteers, teachers and trainers, adopted on 10 July 2001<sup>16</sup>, which identify the areas where European or Member State level actions are needed for development.

In 2004, the European Commission prepared a report to follow up the Recommendation. It provides an overview of national and Community actions taken for the implementation of the objectives set in the Action Plan and the Recommendation, and makes proposals for further actions, in relation to the Lisbon objectives (e.g. removal of existing legal obstacles, increased commitment to funding mobility on the part of the Member States, recognition of learning acquired through mobility, marketing European education, etc.).

In the year 2004, Working Group F prepared two documents of outstanding importance. These are the **Quality Charter for Educational Mobility** and a proposal concerning desired actions for **strengthening access to mobility**.

The **Quality Charter** contains a list of key quality criteria for educational mobility, which includes the existence of training/study plan for the mobility period, the integration of the mobility period into the studies / career path of beneficiaries, the recognition and transparency of skills acquired through mobility, the preparation preceding travel, the importance of mentoring, logistic support abroad, the monitoring and evaluation of the mobility period, assistance with re-integration and the clear definition of the commitments and responsibilities of the parties involved in the implementation of mobility.

According to the authors' intention, the Charter should be a reference document describing the main quality principles. Its application is not compulsory,

<sup>15</sup> Action Plan for Mobility - [http://www.bologna-berlin2003.de/pdf/Council\\_actionplan\\_mobility.pdf](http://www.bologna-berlin2003.de/pdf/Council_actionplan_mobility.pdf)

<sup>16</sup> Recommendation on mobility within the Community for students, persons undergoing training, volunteers, teachers and trainers  
[http://europa.eu.int/comm/education/doc/down/mobility\\_en.pdf](http://europa.eu.int/comm/education/doc/down/mobility_en.pdf)

on the contrary: it is a recommendation to be used on a voluntary basis. This approach is reinforced by the “universal” nature of the document, which enables the adaptability of the quality criteria to the properties of different mobility actions and programmes, as well as their amendment or modification, as appropriate.

The aim of the proposal prepared by the Working Group concerning access to mobility is to lay down guidelines and specific practical advice to help the Member States develop coherent national policies and initiate actions to improve access to mobility, with particular emphasis on the role of mobility in combating social exclusion.

The document provides an overview of the main factors impeding mobility, and proposes specific actions to remove them. These include the provision of advice and training tailored to the needs of the target group, making the eligibility criteria of mobility opportunities / programmes more flexible and favourable, improving access to information, strengthening the social and communication skills required for mobility, the recognition of competences acquired earlier, and the development of new, more flexible systems of support (with the involvement of the affected target groups).

### **Key Document of the Working Group on Active Citizenship**

#### ***Presidency conclusions on Citizenship education as part of the ‘Lisbon Agenda’***

The Presidency notes with satisfaction that European Ministers of Education and the European Commission, meeting in an informal session in Rotterdam on 12<sup>th</sup> July 2004, adhere to the following basic principles.

Recent changes affecting the social and cultural condition of our societies such as globalization, immigration, communication technology and individualization, present new challenges to the existing mechanisms by which norms and values that are the basis for social cohesion, are transferred to next generations of citizens.

As European societies need the participation of active citizens, many Member States are making efforts to enhance social cohesion by promoting active citizenship in democracies in schools as well in the field of lifelong learning.

The study “Citizenship – Made in Europe: living together starts at school” shows that:

Member States assign a key role to schools in strengthening citizenship education for social cohesion, also with regard to immigrants.

Member States display a wide variety of educational practices in citizenship education, while showing convergence as to the objectives and the underlying values pursued by it.

Numerous initiatives have already been developed in the context of the European Union and the Council of Europe: promoting cooperation by exchanging knowledge and experience and developing common standards as a part of the Lisbon agenda.

The peoples of Europe, though diverse in many respects, share values, history and future challenges: they are united in diversity. An extra challenge lies in enabling the growing number of immigrants to become new EU citizens.

The fundamental values of respect for human dignity, respect between men and women, liberty, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities, which are reflected in the proposed Constitutional Treaty, offer an anchor for formulating shared educational objectives on citizenship education.

Fostering citizenship is a task for which active cooperation with other stakeholders such as parents must be sought.

### **Key documents of the Working Group on Making Learning More Attractive and Strengthening Links to Working Life and Civil Society**

#### ***Conclusions of the Council and the Member States on the definition of Common European Principles for the identification and validation of the outcomes of non-formal and informal learning***

Following the Commission Communication Making a European Area of Lifelong Learning a Reality adopted in November 2001, lifelong learning became the guiding principle of policy development in education and training. The Communication underlined the need for transforming formal education and training systems and creating a flexible learning environment to remove the barriers between the various forms of learning. In view of this, Working Group H prepared a proposal concerning the common European principles of non-formal and informal learning. The aim of the conclusions adopted is to encourage the development of systems for the identification and validation of knowledge, skills and competences acquired through different forms of learning, building upon the voluntary co-operation of Member States.

The approaches to the validation of the outcomes of non-formal and informal learning and the methods of validation are highly varied at the national, regional and local levels in Europe. The development and application of jointly defined European level principles are meant to enable the comparison of the various solutions applied by the Member States, and the long term recognition of them in the other Member States.

For the purposes of the Principles, identification of outcomes means the identification, assessment and documentation of the acquired personal knowledge, skills and competences which do not lead to formal qualifications, but may subsequently serve as a basis for them. Validation means the appreciation of non-formal and informal learning outcomes, which may lead to a formal certificate or qualification.

The identification of the outcomes of non-formal learning is a task shared by all affected actors, while the validation of the acquired skills primarily falls within the competences of the competent authorities, in accordance with the regulations of the Member States.

### **Key documents of the Standing Group on Indicators and Benchmarks**

#### ***Definition of indicators for the strategic objectives (April 2003) (Indicators for the follow-up of the objectives of education and training systems of Europe)***

This working document takes stock of the initial and the adopted indicators for the objectives under strategic goal 3. The working document contains the sources of data for the various indicators, general and country specific notes related to the indicators, and other comments for the indicators.

#### ***Final list of indicators to support the implementation of the work programme on the future objectives of the education and training systems. Result of the consultation of the working groups. (July 2003)***

The Standing Group on Indicators and the working groups of experts finished the consultation on the indicators identified in the Detailed Work Programme in April 2003. Following the consultation, the Standing Group on Indicators finalised the list of indicators.  
<http://www.om.hu/main.php?folderID=755&ctag=articlelist&iid=1&articleID=3022>

#### ***Progress Towards the Common Objectives in Education and Training. Indicators and Benchmarks. Commission Staff Working Paper SEC(2004)73.***

This working document contains an analysis of the state of education based on the existing indicators, by taking into account the aspects of the Lisbon objectives.  
[http://europa.eu.int/comm/education/policies/2010/doc/progress\\_towards\\_common\\_objectives\\_en.pdf](http://europa.eu.int/comm/education/policies/2010/doc/progress_towards_common_objectives_en.pdf)

#### ***Commission Communication on European Benchmarks (20 Nov, 2002; Council Conclusions on European Reference Levels (Benchmarks) of 5 May 2003.)***

This document contains the concrete common benchmarks for education and training, which are assigned to the Lisbon objectives of March 2000, and were adopted by the Council on 5-6 May 2003.  
[http://europa.eu.int/comm/education/policies/2010/back\\_indi\\_en.html](http://europa.eu.int/comm/education/policies/2010/back_indi_en.html)

### **Indicators Identified by the Standing Group on Indicators and Benchmarks**

#### ***Strategic objective 1: Improving the quality and effectiveness of education and training systems in the EU***

Objective 1.1: Improving education and training for teachers and trainers.

- 1.1.A Distribution of teachers teaching in public and private institutions by ISCED level and age group.
- 1.1.B Change in the numbers of young people in the 0-14 and 15-19 age groups.
- 1.1.C Ratio of pupils to teaching staff by education level.

Objective 1.2: Developing skills for the knowledge society

- 1.2.A Percentage of the those aged 22 who have successfully completed at least upper secondary education (ISCED3).
- 1.2.B Percentage of pupils with reading literacy proficiency "level 1" and lower in the PISA reading literacy scale
- 1.2.C Distribution and mean performance of students, per country, on the PISA reading literacy scale
- 1.2.D Distribution and mean performance of students, per country, on the PISA mathematic literacy scale
- 1.2.E Distribution and mean performance of students, per country, on the PISA science literacy scale
- 1.2.F Percentage of adults with less than upper secondary education who have participated in any form of education or training, in the last 4 weeks by age group (25-34, 35-54 and 55-64).

Objective 1.3: Ensuring access to ICT for everyone

No indicator proposed in this area

Objective 1.4: Increasing recruitment to scientific and technical studies

- 1.4.A Students enrolled in mathematics, science and technology as a proportion of all students in tertiary education (ISCED 5A, 5B and 6) by sex.
- 1.4.B Graduates in mathematics, science and technology (ISCED 5A, 5B and 6) as a percentage of all graduates (ISCED5A, 5B and 6)
- 1.4.C Total number of tertiary (ISCED5A, 5B and 6) graduates from mathematics, science and technology fields, in thousands
- 1.4.D Number of tertiary (ISCED 5A, 5B and 6) graduates in mathematics, science and technology per 1000 inhabitants aged 20-29 (structural indicators).

Objective 1.5: Making the best use of resources.

- 1.5.A Public expenditure on education as a percentage of GDP (structural indicator)
- 1.5.B Private expenditure on educational institutions as a percentage of GDP
- 1.5.C Enterprise expenditure on continuing vocational training courses as a percentage of total labour costs
- 1.5.D Total expenditure on educational institutions per pupil/student by level of education (and ISCED total all levels) (PPS)

- 1.5.E Total expenditure on educational institutions per pupil/student by level of education (and ISCED total all levels) relative to GDP per capita

**Strategic objective 2: Facilitating access for all to education and training systems**

Objective 2.1: Open Learning environment

- 2.1.A Percentage of the population aged 25-64 participating in education and training in 4 weeks prior to the survey, by level of educational attainment (structural indicator)

Objective 2.2: Making learning more attractive

- 2.2.A Hours in CVT courses per 1000 working hours (only enterprises with CVT courses), by NACE.  
2.2.B Hours in CVT courses per 1000 hours worked (all enterprises), by NACE  
2.2.C Participation rates in education (ISCED1-6)  
2.2.D Share of the population aged 18-24 with only lower secondary education and not in education or training (structural indicator)

Objective 2.3: Supporting active citizenship, equal opportunities and social cohesion

No indicator proposed in this area

**Strategic objective 3: Opening up education and training systems to the wider world**

Objective 3.1: Strengthening the links with working life and research and society at large

No indicator proposed in this area

Objective 3.2: Developing the entrepreneurial spirit

No indicator proposed in this area

Objective 3.3: Improving foreign language learning

- 3.3.A Distribution of lower/upper secondary pupils learning foreign languages.  
3.3.B Average number of foreign languages learned per pupil in upper secondary education

Objective 3.4: Increasing mobility and exchange

No indicator proposed in this area

Objective 3.5: Strengthening European co-operation

- 3.4/5.A Inward and outward mobility of teachers and trainers within SOCRATES (Erasmus, Comenius, Lingua and Grundtvig) and Leonardo de Vinci programmes  
3.4/5.B Inward and outward mobility of Erasmus students and Leonardo da Vinci trainees.  
3.4/5.C Foreign students enrolled in tertiary education (ISCED5 and 6) as a percentage of all students enrolled in the country of destination, by nationality (European country or other countries)  
3.4/5.D Percentage of students (ISCED5-6) of the country of origin enrolled abroad (in a European country or other countries)

**I.4. BEST PRACTICES IN HUNGARY**  
**(A selection from Hungarian best practises presented to the EU working groups)**

**Basic skills and competences**

**Title: DIFER Programme package: Diagnostic development-assessment and criterion-oriented system for the development of the 4-8 age group**

**Name and full contact details of key informant:** Sándor Brassói, Deputy Head of the Department for the Development of Public Education, Ministry of Education *sandor.brassoi@om.hu*

**Summary:**

An essential precondition for independent learning is the acquisition of basic skills. The general aim of the programme is to allow all children without mental handicap to acquire these skills at a level appropriate for the criterion of optimal applicability, regardless of the excessive differences of the stages of development among children entering school, and with the least possible number of failures. There are certain crucial preconditions for the optimal acquisition of basic skills, called crucial prerequisite skills or shortly: critical skills. Without the optimal functioning of these skills, optimal acquisition of basic skills is an extremely laborious task, laden with failures and frequently unsuccessful. Therefore, a more precise general aim of the programme is to aid the optimal acquisition of the critical skills that form the prerequisite of fruitful learning.

Currently, the task comprises the criterion-referenced development of 7 critical elementary skills.

These are the following:

- So-called writing movement co-ordination (a special form of the fine movement co-ordination of the hand), which is the prerequisite of the effective learning of writing.
- The skill of phoneme perception, which is the prerequisite of the learning of reading.
- Relational vocabulary, which is an elementary prerequisite of verbal communication.
- The skill of understanding experiential relations and drawing conclusions,
- The prerequisite of elementary reasoning; elementary level of experiential calculative skills.

The target group consists of children at kindergarten (aged 4-7) and pupils in the first and second year of primary school (aged 7-8). The main aim in the first phase of this project is to develop and train the teachers and educate and develop the basis skills of the pupils of the regional member institutions, particularly the kindergarten and elementary schools at regional levels. The prerequisite of mathematical education; and elementary level of sociability is a necessary condition for cooperation at school.

Research and experience indicate that the fruitful development of basic skills and a successful start at school is possible for those children who apply these

critical skills optimally and who are appropriately motivated. Since a significant proportion of pupils commence their school studies without possessing these prerequisites, and presently schools are unable to face this situation, a large proportion of pupils are predestined for failure. The aim and task of the programme is to facilitate the solution of this problem. On the basis of this framework now it is possible to implement the criterion-oriented development of key competences. The implementation program is supported by several accredited (30 hours) in-service teacher training courses and until now hundreds of primary school teachers have been trained.

In 2003 in all Hungarian elementary schools the class teachers received the evaluation and examination kits/packages for the criterion-oriented development of key competences developed earlier. The national Act on the annual budget provides the appropriate funds for these measures. In-service teacher training can be financed by the schools from the normative support for schools which comes from state budget.

### **Language Learning**

**Title:** ICT in Language Learning: a “Digital Pedagogy” for German and English

**Duration:** 2001-2003

**Name and full contact details of key informant:** *Andrea Kárpáti D. Sc.*, project leader, Eötvös Loránd University, Faculty of Sciences, UNESCO Centre for ICT in Education, (In Hungarian: ELTE TTK UNESCO Információtechnológiai Pedagógiai Központ), 1117 Budapest, Pázmány sétány 1/a, Tel.: 36-1-372 297 Fax: 36-1-372 2948 Mobile phone: 36-30-211 4936, [karpatian@axelero.hu](mailto:karpatian@axelero.hu); *Ida Dringó Horváth* manual editor and leader of the foreign language working group in the project, senior lecturer at Kodolányi János College, Székesfehérvár, Szabadságharcos út 59. Mobile: 36-20-410-4607, [dhida@axelero.hu](mailto:dhida@axelero.hu)

**Aims:** Based on experiences of a two-year teaching project in 12 schools, elaboration of a teacher’s handbook entitled *ICT in the teaching of foreign languages for the teaching of 12-18 year old students* that can be used easily in language lessons and giving ideas and help for foreign language teachers interested in using ICT.

**Objectives:** personalised learning, ICT-supported online and off-line communication, empowerment of students and teacher to seek information in authentic language usage environments, acquisition of information retrieval and processing skills, producing digital learning tools with the help of authoring tools.

**Target Group:** 12-18 year old students

**Key activities:** Within the framework of an international research project “*ICT and the Quality of Learning*” (coordinated by OECD / CERI, carried out 1999-2002, involving 23 countries) it was investigated if and how ICT resulted in changes in the quality of teaching and learning in public education. Besides, teaching methods of 6 ICT supported subjects have been worked out and tried out in 45 classes. A two-year school experiment was conducted and 6 teachers’

handbooks developed, one dealing with ICT in the teaching of foreign languages.

The teachers’ handbook consists of three main parts (curricula, lesson-plans and software analysis) complementary documents, free demos and full versions of software products.

**Dissemination:** The handbook was published in 1000 copies in 2003, presented at 22 national, international conferences and seminars, and used in accredited teacher training courses.

**Working methods:** Approx. 100 participating teachers (in all the 6 subjects) received grants for 2 years and took part in methodological in-service training and continuous consultation (consultation with a mentor once a month).

**Financial support:** The Ministry of Education gave financial support to the project.

**Perceived strengths:** The 12 teachers participating in the developing of the ICT handbook for language teachers became mentors and disseminators (in teacher training courses, too).

**Perceived weaknesses:** As the handbook is not yet included in the list of textbooks approved by the Ministry of Education, many teachers do not know about it or cannot order it for a subsidised price.

**Future prospects:** The plan is to publish the book in an updated version, and submit it for inclusion in the list of state approved manuals.

**Title:** *The 3-year B.Ed. TEFL Programme at the Centre for English Teacher Training* (CETT-ELTE Budapest); School of English and American Studies, Faculty of Humanities, Eötvös Loránd University of Sciences (ELTE), Budapest, Hungary. <http://www.btk.elte.hu/cett/>

**Name and full contact details of key informant:** Christopher Ryan, Senior Lecturer, former head of department, [kristoff@ludens.elte.hu](mailto:kristoff@ludens.elte.hu), CETT-ELTE, Budapest XIV, Ajtósi D. sor 19, H-1146

**Aims**<sup>17</sup>: The three-year pre-service programme established in 1990 aimed at contributing to the development of skilled, competent and professional teachers of English in Hungary.

**Objectives:** Graduates are expected to demonstrate theoretical knowledge behind language education methodology, ability in evaluating their own teaching, proficiency in English, insight into the cultures of English-speaking peoples, ability in undertaking academic research.

**Target Group:** Hungarians aged 18 (and slightly over) with good results in the university entrance examination and mature students with considerable work experience (inc. teaching). Most (but by no means all) of the trainees will intend to become teachers of English.

**Key activities:** Principal innovative features: previously unheard-of proportion (60 percent of the curriculum) of classroom-related courses and activities, half a year of practice teaching amounting to 60–90 hours of actual classroom

<sup>17</sup> The main source of all curriculum-related data is the Griffiths, J., C. Ryan, & Zs. Király (Eds.) (2001, Fifth edition) Curriculum for the B.Ed. TEFL. Available in electronic form upon request.

teaching (between 1992 and 2000 one year of practice teaching), B.Ed. dissertation to be based on a classroom-research project; strong emphasis on the development of academic skills, philology courses

**Working methods:** Practice-oriented learning: most CETT courses run in seminar format.

**Financial support:** by the host university through normative financing, i.e. CETT Budapest operates within Eötvös Loránd University. Between 1990 and 2001 the key external supporter was the *British Council* (through ELTSUP). Besides: *World Bank* and *SOROS Foundation*.

**Perceived strengths:** *internal:* independent department specially created to develop and run the programme, resulting in autonomy, enthusiasm, team spirit; experiential/constructivist learning; *external: spin-offs and impact on broader profession;* "Tried-and-tested" comprehensive pre-service teacher education programme, (written up as formal curriculum) based on above principles with carefully worked out integration of simultaneous and successive courses.

**Perceived weaknesses:** Risk of incomprehension and rejection (sometimes overt) by own institution, target groups and effective authorities (and even within department), practical difficulties of operating delicate, highly integrated curriculum within unstable parent institution with typically less sensitive, more robust "atomised" programme structures, Difficulty of adjusting programme to changing target population (knowledge, skills, attitudes), difficulties of adjusting.

**Future prospects:** Further development and accommodation of the programme in view of upcoming new higher education structures, the EU's "Bologna principles"; increased use of resources developed for this programme in other educational/training contexts domestically and abroad; new partnerships with professional institutions domestically and abroad.

**Title: The Mentor Training and Development Course of the Centre for English Teacher Training (CETT-ELTE);** School of English and American Studies, Faculty of Humanities, Eötvös Loránd University of Sciences (ELTE), Budapest, Hungary. <http://www.btk.elte.hu/cett/>

**Name and full contact details of key informant:** *Judit Révész*, assistant lecturer, [rjudit@ludens.elte.hu](mailto:rjudit@ludens.elte.hu), [balogrevesz@axelero.hu](mailto:balogrevesz@axelero.hu), CETT-ELTE, Budapest XIV, Ajtósi D.sor 19, H-1146, Tel: 36-1-4604424; Fax: 36-1-4604403

#### Summary:

**Background and Overall Aims of the Programme:** to train special school-based mentors to work with student teachers (participating in the initial teacher training programme, CETT Budapest) during their year-long teaching practice. The first 120-hour course was run in 1991.

**Target Group:** Primary and secondary school teachers with at least three years' teaching experience (selection through class observation and interview).

**Key activities:** selection of school-based mentors, developing/updating the Mentor Course Workbook (a selection of relevant articles with reading tasks),

120 hour mentor training and development course, delegation of student teachers to mentors, on-going mentor meetings for information and development.

**Course Objectives:** to give the students opportunities to make explicit and share their own beliefs about learning, teaching and mentoring, to gain some knowledge about concepts of professional learning, mentoring counselling techniques assessment and evaluation, to practise skills in relationship management, active listening, body language.

**Working methods of the course:** 90 contact hours over one university semester. In the initial phases: a great deal of awareness raising activities for observation and interpersonal skills development. Later: tasks based on teaching videos, using a variety of observation schedules and note-taking techniques with role-plays. Keeping records throughout, in the end review of the mentoring reasons for the various activities and tasks. 30 hours devoted to the readings from the Workbook, followed by related in-class activities, as well as to self- and peer classroom observation, the writing of development reports and a final assignment.

**Financial support:** Part of the general university/faculty operational budget; part of the national in-service training scheme; schools pay 80 per cent or the whole from their staff development budgets; fee paying courses are run for private language school mentors.

**Perceived strengths:** The ongoing and final feedback on each and every course has overwhelmingly shown that the mentor training course not only prepares participants for their work as mentors but leads many to making fundamental changes in their approach to teaching and in their personal relationships.

**Perceived weaknesses:** The programme has been developed only for language teachers so far, therefore no whole-hearted central (ministry) support for the programme, insufficient funding for adequate follow-up support of mentors at work.

**Future prospects:** extension of the programme to other subject teachers (inc. English medium subject teachers), launching a so called "master course" for practising qualified mentors.

#### ICT in education

**Title: Digital Knowledge Base**

**Name and full contact details of key informant:** Mr. Tamás Könczöl, Research Director, Hungarian Schoolnet Foundation. E-mail: [kabo@sulinet.hu](mailto:kabo@sulinet.hu), Tel.: 36-1-477-31-67 Fax: 36-1-477-31-88 Mobile: 36-30-466-15-22

**Keywords:** networked schools, provision of digital content, computer—supported learning, CSCL (Computer Supported Collaborative Learning), LCMS (Learning Content Management System), VLE (Virtual Learning Environment), in-service teacher training

**Duration of policy:** 2002-2005 **Home page:** [www.dtb.sulinet.hu](http://www.dtb.sulinet.hu)

#### Summary:

Aim: facilitation of ICT-based teaching and learning practices through the elaboration of a system of reusable learning objects (RLOs) and other digital

teaching materials stored in a customisable content management system. This database provides up-to-date, pedagogically and scientifically reliable content for the 10 educational areas (discipline clusters) of the Hungarian National Core Curriculum. Teachers will be encouraged to use this system to up- and download reliable, tried and tested learning materials and thus expand the use of ICT in primary and secondary education, in subject teaching.

This policy supports innovation and mainstream implementation or generalisation of outcomes of learning research at the same time. It encourages innovative work of teachers, scientists, professional organisations in education as well as commercial software companies through a range of tenders and contests and features winning entries in a well-structured, easy-to use database environment that teachers can tailor to their own needs. The policy catalyses teaching expertise of educators and software development skills of professional developers in a variety of co-operative options ranging from brainstorming to team work in design and development. The most important missions of the policy:

- Decentralisation of educational content development
- Involvement of a wide range of public and private partners and stakeholders
- Intensive involvement in the elaboration of European software standards
- Teacher training Programmes provided for potential developers and users
- Provision of professional background to ensure the participation of teachers in the realisation of policy

#### **Title: In- and Pre-Service Teacher Education in ICT-Supported Pedagogy**

##### **Name and full contact details of key informants:**

*In-Service Teacher Training Initiative of the Hungarian Schoolnet*

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*Pre-Service Teacher Training - a national initiative*

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**Keywords:** in-service teacher training, pre-service teacher training, educational paradigm, computer-supported collaborative learning, new learning environments

**Duration of policy:** 1998-ongoing. **Outline, Summary**

##### **Summary:**

*In-Service Teacher Training Initiative of the Hungarian Schoolnet*

This policy supports mainstream implementation of ICT-based teaching methods in Hungarian schools through in-depth training of already practising teachers, but also endorses innovation with advanced methods courses for teachers of the pioneering ICT schools. Based on research results and experiences of good practice, elaboration of a set of in-service teacher training programme modules targeting ICT teachers, non-specialists (K-12), educators of

mentally and/or socially handicapped pupils was developed. According to a recent survey 30% of practising teachers hold some kind of ICT certificate. Training utilises experiences of ICT Model Schools, a network of excellence organised by the Hungarian Schoolnet.

##### *Pre-Service Teacher Training – a national initiative*

Groups of teachers in training arriving at Eötvös University (ELTE) are given compulsory training in basic ICT skills at their secondary grammar schools thus teacher training institutions are provided with a firm foundation to build their programmes on “digital pedagogy”. The core of the policy is the integration of results of educational research into teaching practice through ICT. The UNESCO Chair for ICT in Education at ELTE took the lead in opening training courses from freshman to senior level, ranging from general methodology of computer-based education to sophisticated applications of Virtual Learning Environments. Students are encouraged to adapt, modify and develop digital teaching aids and acquire discipline-based teaching methods in laboratory schools of exemplary ICT use.

#### ***Increasing recruitment to science and technology***

**Title: ABACUS, a mathematical monthly**

**Name and full contact details of key informant:** Mihály Csordás, H-6001

Kecskemét, Pf.585., Telephone:+36-76-505-753, E-mail:

*mategye@mail.datanet.hu*

**Summary:** *The short history of the periodical:* The ABACUS periodical was established by Sándor Róka in 1994, and during four years he made it attractive for pupils aged 10-14, their teachers and for those interested in mathematics. Since 1 September 1998 the periodical has been published by the János Bolyai Mathematics Society and the Foundation for Talented Pupils in Mathematics. The professional guidance is done by the general editor from János Bolyai Mathematics Society and the financial, administrative and mailing matters, the publication and the layout and are done by the Foundation for Talented Pupils in Mathematics.

*The availability of the periodical:* The periodical is published monthly from September to May, 9 issues annually. It has 48 pages in A/5 format. It is printed professionally.

*The format of the periodical:*

**Kids’ Logic:** It contains a competition for pupils aged 9-10. Each month 5 exercises based on the same story are done by the pupils at home, and the solutions are mailed to the Foundation for Talented Pupils in Mathematics. The exercises then are corrected and sent back to the pupils. At the end of each academic year those whose achievement is over 50% receive a certificate.

**Competition for pupils aged 11-14:** Each month the pupils do 6 interesting exercises, they send the solutions to the Foundation for Talented Pupils in Mathematics. They correct the exercises and send them back to the pupils. At



the end of each academic year those whose achievement is over 50% receive a certificate.

**Mathematics-history:** This column contains fascinating stories, anecdotes from the history of mathematics.

**DIY-maths:** It contains modelling exercises for mathematical problems with everyday objects that pupils can make themselves at home.

**My favourite exercise:** This column contains witty solutions to mathematical exercises chosen by teachers.

**Logi-corner:** It contains humorous logical exercises.

**Logi-graphics:** In this column pupils can find a graphics based game. (It is very popular in Japan.)

**Chess-corner:** Here thought-provoking and amazing chess problems can be found.

**Info-derby:** It contains Internet-user problems.

**Mathematical problems:** Difficult mathematical exercises and their solutions can be found here.

**Physics:** It contains a competition of calculation and measurement exercises.

**Astronomy:** These are interesting and relevant articles on astronomy.

**Maths:** This column contains solutions of mathematical problems in English.

**Mathematik:** This column contains solutions of mathematical problems in German.

**Book review:** In this column the latest books on mathematics are introduced.

The headings above are complete with articles, jokes and amusing stories from the field of mathematics.

**Title: Élet és Tudomány (Life and Science)**

**Name and full contact details of key informant:** János Herczeg; H-1428 Pf. 47. Budapest, Bródy Sándor u. 16.,

E-mail: [eltud@elender.hu](mailto:eltud@elender.hu), <http://www.eletestudomany.hu>,

**Summary:** Aims and objectives:

Develop a wider interest in MST to cover any field of science.

Create a general weekly paper/journal to disseminate culture.

Offer the latest results of sciences for teachers and interested pupils/students in a clear, and understandable form.

Present the top new resources/devices/results of IT.

Represent the authentic theoretical background of scientific news by the best experts in particular fields within the capacity of everybody.

Increase the degree of culture in the field of mathematics and develop the different ways of mathematical thinking of the reader.

**Target Groups (e.g. secondary, primary, combinations):** Secondary students, young adults and adults

**Evaluation of Initiative:** The journal was founded in 1946 and has been published regularly ever since. Annually statistics are produced by Szonda Ipszos

regarding readership and reader satisfaction of the journal. 16 thousand copies are produced weekly (32 A4 pages) with a readership of 100 thousand. (Population: 10.5 million) For the past 30 years the journal has been staging a competition in mathematics: 'A gondolkodás iskolája' (The School of Thinking) in which competitors must provide the solutions to 10 different problems in written form. Then the correct solutions and additional remarks are published. Over 1 thousand competitors take part. No extra mathematical knowledge is required.

8 of the pages are student oriented. The journal wishes also to provide articles directly related to not only the teaching profession but also to the recipients of mathematics and science information.

The journal would also be available on the Internet.

**Mobility and European Cooperation**

**Title of the programme:** Mobility Scheme for Vocational School Pupils

**Name and full contact details of key informant:** Ms Bianka Hajdu, Leonardo National Agency, H-1134 Budapest, Váci út, Tel: +36 1 237 1300, Fax: +36 1 239 1329, E-mail: [bianka.hajdu@tpf.hu](mailto:bianka.hajdu@tpf.hu), [www.tka.hu](http://www.tka.hu)

**Key expressions:** initial vocational training, European placements, socially disadvantaged youngsters

**Duration of the programme:** continuous from 2003

**Summary:**

Experience within the mobility measure of the Leonardo da Vinci program showed that projects involving „young people undergoing initial vocational training” tended to benefit young people who received vocational training after secondary school and so young people who only attended vocational school (without the maturity-type examination) were in a disadvantaged position.

These youngsters generally come from a disadvantaged social background and are less motivated for studying than those attending secondary vocational schools. However, on the labour market there is a lack of qualified craftsmen who are willing to perform physical work to satisfactory standards. Therefore the Hungarian Ministry of Education started its Development Program for Vocational Schools in 2003, which tries to tackle the problems of these schools from different aspects.

The Hungarian Leonardo National Agency set up a special mobility scheme linked to the development programme for this specific target group based on their demands and the Leonardo experiences. The initiative is financed by the Ministry of Education. The scheme, which provides support for organising work-experience abroad for trainees coming from vocational schools, is very similar to the Leonardo mobility measure, with the following modifications:

- the application form is simpler,
- the rate of support for project management activities is double,
- the rate of support for subsistence costs is increased by 50%,
- the rate of support for linguistic, cultural and psychological preparation is double.

The programme is unique in the sense that it focusses on the demands of a very specific target group and it has been designed to have maximum efficiency. The increased financial support on the one hand tries to contribute to those activities that are of primary importance in identifying the most suitable placements, namely the project management, and the thorough preparation of the trainees, while on the other hand it helps cover the cost of living, which is also necessary because of the disadvantaged social and economic background of the target group.

### **Education for Active Citizenship, Equal Opportunities, and Social Cohesion**

I. An example of policies and good practice on “Ensuring equal access to the acquisition of skills for the disabled”

Among the main changes of the recent past in policies concerning the education of disabled people it seems appropriate to present the following example of trends emerging from the information collected so far.

#### **Title: Entrance Examination to Higher Education (Decree 28/2002 (V.17.) of the Minister of Education)**

**Name and full contact details of key informants:** Gábor Daróczy Ministerial Commissioner for the Integration and Roma and Disadvantaged Children, H-1055 Budapest Szalay u. 10-14., Tel: +36 1 473 7032, E-mail: gabor.daroczi@om.hu; Judit Szira, H-1055 Budapest Szalay u. 10-14., Tel: +36 30 984 8063, E-mail: judit.szira@om.hu;

#### **Summary:**

The Decree 28/2002 (V.17.) of the Minister of Education lays down the procedures of admission to higher education institutions for young people with disabilities. Disabled candidates are allowed to use the same aids during entrance examinations as at the secondary school leaving examination.

II. Examples of policies and good practice on fully integrating equal opportunities in the objectives and operation of education and training in the course of the life long learning process

The examples of good practice presented deal with specific organisations to support and intervene directly against racism and xenophobia issues. These centres are focused on society and on the education system as an important part of it.

#### **Title: The Commissioner for Educational Rights**

**Name and full contact details of key informant:** Dr Lajos Aáry-Tamás  
Commissioner for Educational Rights, H-1055 Budapest Szalay u. 10-14., Tel: +36 1 473 7090, E-mail: lajos.aary-tamas@om.hu; Internet: www.om.hu

#### **Summary:**

The Ministry of Education established the Office of the Commissioner for Educational Rights in 1999. The Office is an organisational unit within the Ministry of Education with a special status and autonomy, in charge of protecting civic rights of participants in education. The Office operates within the human rights protection scheme in Hungary, and is organised as an ombudsman-like institution. The Commissioner for Educational Rights may act if educational rights are infringed upon or under immediate threat of infringement. A characteristic potential for action of the Commissioner for Educational Rights is to draw up initiatives and recommendations. These do not have legal force, meaning that the addressed institutions are not compelled to act upon them. One of our most important tasks is to generate an open, honest and professional dialogue about the rights of students, teachers and parents.

#### **Title: Capitation Grant to Promote Integration**

**Name and full contact details of key informants:** Gábor Daróczy Ministerial Commissioner for the Integration and Roma and Disadvantaged Children, H-1055 Budapest Szalay u. 10-14., Tel: +36 1 473 7032, E-mail: gabor.daroczi@om.hu; Judit Szira, H-1055 Budapest Szalay u. 10-14., Tel: +36 30 984 8063, E-mail: judit.szira@om.hu;

#### **Summary:**

As of 1 September 2003, a “Capitation grant to promote integration” has been available for the 1<sup>st</sup> and 5<sup>th</sup> grades of primary schools (with the subsequent grades of school progressively covered in the following years). The amount of this grant is three times the amount of the “skills development grant”, it is a significant amount of money to organise and run integrated classes.

The target group of the capitation grant to promote integration includes children whose parents have 8 primary school years or less, and who, due to their financial situation, are eligible for child protection aid, which means that the target group was identified on the basis of social and educational background. More than 80% of this group are Roma, so Roma children are the primary target of the allowance. While hardly more than 20% of all schoolchildren fall in this category, the corresponding figure for Roma children is 80%.

The capitation grant to promote integration programme started in September 2003.

Schools deciding to participate in the programme receive teacher training and may also participate in the school development network.

## **Making Learning More Attractive and Strengthening Links to Working Life and Civil Society**

### **Title: Personal Income Tax Allowance for Adult Education**

**Name and contact details of key contact person:** József Bago, Ministry of Employment-policy and Labour, H-1054 Budapest, Alkotmány utca 3.,  
e-mail: [bago.jozsef@fmm.gov.hu](mailto:bago.jozsef@fmm.gov.hu), [www.fmm.gov.hu](http://www.fmm.gov.hu),

**Summary:** The personal income tax allowance for adult education has been available as of 1 January 2003. Tax allowance may be provided to private individuals participating in adult education, or the spouse paying the tuition fee, parent or guardian, grandparent, brother or sister of the participant subject to a certificate of participation issued by an accredited adult training institution. The amount of tax reduction may be 30% of the tuition fee paid in the tax year (including examination fees), but it may not exceed HUF 60,000 (EUR 250) per tax year together with the tax allowance granted for the acquisition of IT equipment.

The new aid schemes facilitate involvement in adult training through the granting of public funds, and contribute to the implementation of life-long learning by encouraging individual expenditure.

The fundamental objectives of this aid scheme are to create a knowledge-based society, improve employability and the competitiveness of employees, increase interest in adult learning and promote the extension of lifelong learning.

### **Title: 'World – Language', Program Package to Develop Foreign Language Teaching in Hungary**

**Name and contact details of key contact person:** Enikő Öveges, Ministry of Education, H-1055. Budapest, Szalay utca 10-14., E-mail: [eoveges@axelero.hu](mailto:eoveges@axelero.hu)

#### **Summary:**

Key priorities: Developing of foreign language teaching in Hungary, raising the motivation and providing better opportunities for learning foreign languages

Year of inception: 2002

The ten programmes were designed to focus on public, higher and adult education. They involve the development of new materials, teacher training, language courses, conferences, publications and the establishment of resource centres for target groups of different background and age. All languages taught in Hungary are supported, with special emphasis on lesser taught languages. The programmes give further support to good practice and launch innovative initiatives such as content-based teaching in non-bilingual schools. Over 1000 applications were received for the 2003 package.

Aims and objectives:

- Every child should learn *to use* a foreign language before completing public education

- Higher education should provide students with technical language competence
- Opportunities should be provided to students of disadvantaged background
- Awareness of the importance of foreign language competence should be raised

## II. IMPLEMENTATION OF THE WORK PROGRAMME IN HUNGARY

### II. 1. PRESENTATIONS AND WORKSHOPS OF THE EXPERT-SEMINAR (22 October 2004)

#### COMMON OBJECTIVES FOR THE DEVELOPMENT OF EDUCATION IN THE EUROPEAN UNION

##### *The increasing value of education and human resources in other sectoral policies*

The question we are trying to answer here is this: in what ways have the common objectives for the development of education appeared in EU policies – i.e. not only in the ones that relate to the educational sector in the narrow sense. First of all, we need to establish that the value of human resources started to increase in the 1990s outside the educational sector, for reasons that are entirely outside this policy field. The global processes we find behind that are primarily those phenomena that the Community began to experience in the early 1990s and responded to them fairly rapidly. Let us have a quick look at these global processes. They include above all economic growth, competitiveness which is becoming dependent on knowledge, that is a series of processes that we tend to regard as the birth of the knowledge economy, or knowledge becoming a product of key importance. The second element considered global is the transformation of the objectives and instruments of combating unemployment and social exclusion. In these fields, adaptability and the development of people's learning skills are becoming crucially important. This had a marked presence in a major survey called "Job Study"<sup>18</sup> conducted by the OECD in the 1990s, which demonstrated that education and learning were the major means of combating unemployment and social exclusion. And finally – a fact perhaps less known, but still deserving serious attention, I think – governance in general, or more precisely the increasing role of learning and adaptability in the governance of large complex systems. Governance is a concept that appears with increasing frequency in EU documents as a process which presupposes learning or even being a learning process in itself. This is often called *new governance*. You will see that this has become a crucial element of the coordination of educational policies.

These were the influences under which the development of a common European lifelong learning policy began. This is a policy which first appeared in a field other than the educational sector. Let us now have a look at some elements of it. I think that the first major change in this field was the document titled *Growth, Competitiveness, Employment* from 1993, which might as well be called a breakthrough.<sup>19</sup> This was the *Delors Report*, which meant the realisation and recognition at top policy levels of the fact that the start of growth in itself

18 The OECD Jobs Study: Facts, Analysis, Strategies. OECD. Paris. 1994

19 European Commission. *Growth, Competitiveness, Employment – The Challenges and Ways Forward into the 21st Century*. White Paper. European Commission. Brussels. 1994

would not lead to the cessation or reduction of unemployment. This is because unemployment is largely caused by structural reasons, so improving human adaptability should have a crucial role in the fight against it. This was a change of paradigm which drew the attention of employment and economic policies to learning and the improvement of the adaptability of the labour force. That recognition was reflected by the first White Paper on Education in 1995<sup>20</sup> and by the fact that the European Union declared 1996 the European Year of Lifelong Learning. However, this change of paradigm occurred most outstandingly in the so-called *memorandum debate*. The European Commission published a Memorandum on Lifelong Learning in 2000<sup>21</sup> to involve the Member States in a broad based discussion resulting in a document which still has a crucial impact on Community policy on lifelong learning: *Making a European Area of Lifelong Learning a Reality*.<sup>22</sup> It is important to re-iterate that the underlying policy focused on sectors other than education, mainly employment.

It is worth looking at the common policy objectives for education laid down in this document that have been for years setting the directions not only for the Community's policies affecting this field, and that have also served as guidelines for the Member States to define the lifelong learning components of their own national employment strategy. That document, published in 2001, identifies six so-called 'building blocks' that should be part of the national employment strategies, or more precisely their chapters on lifelong learning. The first one is *validation of studying*, i.e. taking measures to enable the validation of learning activities taking place in a variety of arrangements. The second one is *information, guidance and counselling*, given that the support provided to individuals in finding their ways through increasingly complex education and training systems is of key importance. The third one is *investing time and money in learning*. One must point out under this heading that investment here does not only refer to public expenditure, but primarily to creating an opportunity for individuals and the private sector to invest in learning. The next one is *bringing together learners and learning opportunities*, i.e. creating a learning environment which enables and helps people find learning opportunities and make use of them. Finally, this document serving basically employment policy objectives includes two further elements which have particular relevance to general education: these are the improvement of *basic skills* and *innovative pedagogy*. The coordination of national lifelong learning policies began on the basis of these, at first in the employment strategies of the Member States.

It is worth placing particular emphasis on the fact that the value of learning increased within the employment policy at a time when – following the Amsterdam Treaty – the European Employment Strategy (EES) was developed and with that, new instruments to coordinate national policies appeared. As part

20 Teaching and Learning. Towards the Learning Society. White Paper, European Commission Brussels. 1995

21 European Commission. Memorandum on Lifelong Learning. Brussels. 2000

22 European Commission. *Making a European Area of Lifelong Learning a Reality*. Communication from the Commission. Brussels. 2001

of the implementation of the European Employment Strategy, as of the second half of the 1990s, new guidelines and common objectives have been defined every year and indicators are being assigned to them to help measure progress. The Member States translate the common objectives into national action programmes every year, and the Community also evaluates the action programmes and the implementation thereof on an annual basis. This latter is presented to the Commission and the Council of Educational Ministers in a *Joint Report* to be discussed and adopted at head of state level. This provides major feedback to the Member States.

An analysis of the employment policy documents of the last 5-6 years – i.e. the guidelines, the national action programmes and the Community evaluation reports – would reveal that the value of lifelong learning has continuously grown over the years. Let us take a glance at the employment guidelines published in 2002.<sup>23</sup> Lifelong learning is a key horizontal priority and the Member States are required to develop individual national strategies in this field – using the building blocks proposed in the document *Making a European Area of Lifelong Learning a Reality* mentioned above. 2003 saw a significant change in the employment policy guidelines: the goals were defined on a new basis and the new goals included full employment, improving the quality of work and other social policy objectives. Compared to the earlier objectives, fewer specific objectives were defined, but one of these was the development of human resources and lifelong learning. The 2003 guidelines<sup>24</sup> emphasised that the development of human resources and lifelong learning policies are essential for the implementation of all three fundamental goals (i.e. full employment, quality of work and social cohesion). The issue of *coherence in common policies* was given particular emphasis here, which is of major significance for us. This means that the instruments of structural policy or structural programmes in education, for example, must be in line with the policy objectives for employment. The various policy documents on employment include a growing number of references to what would be traditionally considered as elements of primary education, such as nursery school provision or the use of ICT in schools.

So much about the impacts of European employment policy. We should never weaken our concentration on changes in structural policy and its effects on the common policy for education and training. An analysis of the major documents about EU structural policy reveals the strengthening of aspects concerning education, and in a broader sense, human resource development since the second half of the 1990s.

The structural and cohesion policies of the EU have three main objectives: reducing the disparities of development in the Member States, economic adaptation and handling the related social tension, and the general promotion of the development and modernisation of the EU as an economy and a society. It is evi-

23 Council Decision of 18 February 2002 on guidelines for Member States' employment policies for the year 2002 (2002/177/EC)

24 Council Decision of 22 July 2003 on guidelines for the employment policies of the Member States (2003/578/EC)

dent that all of these have aspects which have an effect on education or human resource development. Earlier periods were characterised by diverse lines of development; these were consolidated at the beginning of the current period, and three objectives were set for the use of structural funds. These include human resource development and the modernisation of education and training systems. So structural funds are now spent, among others, on the modernisation of the Member States' education and training systems, which entails, as a natural consequence, a stronger Community influence on this field. In connection with this, it is important to note that structural funds may not be used to directly finance programmes for the modernisation of education and training systems in less developed countries, but the development of human resources under programmes aimed to help catching up and structural adaptation must follow the same principles as in the case of developed countries.

Finally, as regards the process that led to an increased value of education and learning in EU policies, we need to mention – apart from the employment and structural policies, the *Lisbon process*, which serves the acceleration of the Union's progress towards the knowledge society and the knowledge-based economy. Clearly, education has a crucial role in this process. The meeting of heads of state held in Lisbon in the spring of 2000 decided that the Community should play a leading role in education.<sup>25</sup> A strategic decision was adopted on extending to education the type of national policy coordination which we have seen in the field of employment policy. This method was given a new name: *open method of coordination*. The decision included that the method should be applied in a flexible, sector specific manner, and in the case of education it was emphasised that policy coordination should be organised as a process of mutual learning.

It is worth adding here that the aspects concerning the development of human resources and education were in the meantime given increasing weight within the *Broad Economic Guidelines* as well, to such an extent that those who want to understand the European objectives for education must spare time to refer to this economic policy document by looking up its chapter on human resource development – which is naturally discussed mainly from the perspective of Community control over public expenditure.

#### *Policy coordination in the education sector: the "objectives process"*

After all these, we can now turn our attention to policy coordination within our own field, the education sector. This is the "objectives process", which we are here to review. An overview of the broader context was essential, because the processes within our sector can be understood in this context only. As it has been mentioned previously, the Lisbon decision provided for the launching of an "objectives process": the heads of states and governments of the European Union decided in 2000 to start Community level coordination of national policies in education. The top leaders did not wait for the ministers, but instantly set five concrete objectives. These are the so-called "benchmarks" whose follow-up

25 European Council (2000): Presidency Conclusions. Lisbon. 23- 24 March 2000

later became the task of the Commission.<sup>26</sup> What is particularly important from our perspective is that the heads of states and governments requested the ministers of education to identify those concrete common objectives that enable the linking of the Member States' educational policies to the Lisbon objectives. The word "concrete" should be stressed here: they called for the definition of operable objectives, i.e. objectives whose implementation can be broken down into concrete tasks whose accomplishment may be verified.

The common objectives were set one year after the Lisbon decision. Since Lisbon, the European heads of states, i.e. the European Council have met every spring to follow up the progress of the Lisbon process. The common objectives were adopted by the Stockholm Council in 2001<sup>27</sup>, so a year was given to define them. The coordination of educational policies within the framework of the Lisbon process are called "objectives process" on the basis of the document adopted in Stockholm. The common objectives set out in this document and the effort made to achieve them closely related to the subject of this conference.

What are these objectives? They are arranged in three groups. The first group of objectives is related to the issue of *quality and effectiveness*: to improve the quality and effectiveness of EU education and training systems. The second group is related to the issue of *access and social cohesion*: to facilitate access to education and training systems for all. In the third group of objectives – opening up education and training for the wider world – it is not clear what holds them together, but they can be best linked to *governance*, i.e. ensuring the openness of education and training systems and, within that, the reinforcement of their adaptability. A certain policy of equilibrium is present in this tripartite system of objectives, as these three policy objectives were often in conflict in the past. Therefore, the decision of the European heads of states and governments, whereby these should be the common objectives of the educational sector, implies a policy seeking equilibrium.

These three groups of objectives contain specific objectives. The first objective, which may be linked to improving quality and effectiveness, is to develop teacher education and training. In the view of the Community, this is a point where improving the quality of education can be best approached. The second one is to improve the skills required in the knowledge society, which relates to the relevance of the content of teaching. One aspect of this is particularly important: ensuring access to information and communication technologies. A separate objective within this group is to increase the number of those studying science and technology. To this date, there may have been fewer problems in this field in Central and Eastern Europe than in many Western European countries, but the indicators have recently started to show unfavourable trends in some countries of this region, too. Finally, this group of objectives include a better use of resources. It is worth emphasising that the Community has started investigating within the sectoral policy whether the Member States use the resources allo-

<sup>26</sup> For more detail, see the presentation by István Vilmos Kovács herein.

<sup>27</sup> The Concrete Future Objectives of Education and Training Systems. Report from Education Council to The European Council. Brussels. 2001

cated to education effectively. It should be noted that the issue of financial effectiveness is closely linked to the quality of education by the Community.

The second group of objectives serves the strengthening of access to education and social cohesion. This includes the creation of open learning environments and making learning more attractive. It is no accident that these are in focus when the aim is to reinforce those functions of education that strengthen social cohesion and equal opportunities. This is underpinned by the increasingly popular approach whereby it is unacceptable that education and training systems produce masses of young people who turn against the world of school and learning. The learning environment should be such that anybody can and should want to have access to it any time. This group includes the objective of education for active citizenship.

Finally, the third group of objectives comprises the objectives relating to national and international openness, adaptability and governance of education systems. It includes above all strengthening the links with working life, research and the wider society. Research is a new element here, as it was less emphasised earlier: this is emphasised by the endeavour to create a closer link between research and social practice and the solution of social problems. Improving entrepreneurial skills – or the entrepreneurial spirit – is a separate key objective. As the documents of the special committees dealing with this subject tend to reflect, it should be understood in a broad sense, and it is an objective associated to the early period of schooling. This group includes improving foreign language learning, mobility, the exchange of students and trainers, and strengthening cooperation at the European level. At the same time, all these help achieve the Lisbon objective of accelerating the transition into a knowledge society.

### **The Outcomes of the "Objectives Process" to Date**

These three groups of objectives of the "objectives process" and the specific objectives under them have become a common educational policy, and the Community has taken a series of steps to achieve them. As part of the Lisbon process, one year after the Stockholm Council, the heads of states and governments met again in Barcelona in 2002. Here, a detailed work programme<sup>28</sup> was adopted to assign concrete tasks to each of the above mentioned objectives and a set of indicators was defined to enable the monitoring of the implementation and effectiveness of tasks. As part of this process, thematic working groups were set up to further the implementation of the work programme, with the involvement of the accession countries. The Hungarian experts delegated to these groups will present their reports during this conference.

Let us have a closer look at some of the outcomes of the "objectives process" to date. Although it was not an immediate constituent of the "objectives pro-

<sup>28</sup> Council of the European Union (2002a): Detailed work programme on the follow-up of the objectives of education and training systems in Europe. Brussels, 20 February 2002

cess", the latter had a major influence on the first evaluation of national learning policies in 2003, which was coordinated by the European Commission Directorate for Education<sup>29</sup>. This was the first serious feedback to the member States and the accession states which was not "hidden" in employment policy, but was an independent action within this sector. In addition, the *Joint Reports* continued to give a great deal of attention to general, basic education in the context of lifelong learning.

One of the most important milestones of the "objectives process" was the establishment of the 12 working groups whose members are delegated by the ministries responsible for education in the Member States (and the accession countries). By the beginning of this year, all of these working groups had to prepare reports on the outcomes of the work done.<sup>30</sup> These reveal upon first reading that developing a common European approach to the key issues of education and common European actions to address them in such way that is in line with the Lisbon objectives is not an easy process, but the educational policy makers and experts of the Member States are ready and able to do it. For a professional dealing with integration in education, exploring the activities of these working groups is perhaps the most exciting thing. These working groups provided a forum to start a genuine, substantial exchange of experiences as well as a process to bring together those representatives of the Member States who deal with education with a view to find a common language and a set of tools – including, in particular, indicators – which enable effective joint action and the evaluation of the results of these actions. It is important to note, however, all the frustration that one experiences in conjunction with these working groups. On the one hand, the participating professionals may be disappointed to see that the working groups are much more involved in common policy making than research. On the other hand, those who represent their governments may find the activities of these working groups too academic, as far as the development of indicators and shared conceptual and theoretical frameworks are concerned.

The first comprehensive evaluation of the "objectives process" was completed in early 2004.<sup>31</sup> The conclusion of the Commission of the European Union was that the progress towards achieving the Lisbon objectives had been unexpectedly slow. As a result, the Council of Education Ministers identified three tasks to accelerate the process and to strengthen the political commitment. Firstly, the *visibility* of the "objectives process" must be increased, which means that it must

29 Implementing lifelong learning strategies in Europe: progress report on the follow-up to the Council resolution of 2002 on lifelong learning. EU and EEA/EFTA countries. European Commission Directorate-General for Education and Culture. Brussels, 3/10/2003; Implementing lifelong learning strategies in Europe: progress report on the follow-up to the Council resolution of 2002 on lifelong learning. Accession countries and candidate countries. European Commission Directorate-General for Education and Culture. Brussels, 3.10.2003

30 These can be downloaded from the website of the European Commission DG Education and Culture

31 "Education & training 2010" - The success of the Lisbon strategy hinges on urgent reforms. Draft joint interim report on the implementation of the detailed work programme on the follow-up of the objectives of education and training systems in Europe. Communication from the Commission. Commission of the European Communities. Brussels, 11.11.2003. COM(2003) 685 final

be presented to the largest circle of national actors to involve them. This conference is a step in that direction. Secondly, the implementation of common objectives should be made more effective, including for example the reinforcement of indicator development, the method of peer review and other forms of cooperation. Finally – and this has arisen from the most difficult debates – it is necessary to strengthen the form of mutual Community level evaluations which we have seen to work in employment policy for years now. This means that the Member States must prepare comprehensive reports on a regular basis (biannually), and based on these reports, the Community must evaluate the implementation of the common objectives at Member State level.

#### *The potential of a common educational policy*

Finally, I would like to say a few words about the opportunities arising from the coordination of education policies by the Community, i.e. the potential of developing a set of tools serving the implementation of the common European education policy at the national level. Above all, the impact of this modernisation process needs to be emphasised as the main goal is to help education adapt to the challenges of the knowledge economy in all countries, including ours. This process helps embrace globalisation, to make use of its benefits and to mitigate the disadvantages by facing the effects of globalisation as a member of a community which is better equipped to cope with them. This process will be instrumental in implementing the national objectives, which would be set even if the Community did not exist. These include the improvement of language teaching or the promotion of the use of ICT in education.

Community co-operation facilitates in an unprecedented manner the import of pedagogical and policy know-how and the technologies improving the effectiveness of education. It strongly supports the function of education in helping economic development and supporting social cohesion by reducing the risk of these functions being sidelined under the pressure of short term goals and suddenly arising problems. Our participation in the "objectives process" guarantees that we will not lose sight of the objective of lifelong learning and our tasks and concrete policy actions are all driven by that paradigm. As part of that effort, participation helps us focus our attention on effective individual learning and to keep quality on the agenda as a policy objective, while the value of the individual as a "consumer" of learning is increasing. This process is a unique driving force for our national educational policy, partly intellectually, and partly by making new development funds available through the new structural policy, which enables us to launch new development programmes. Finally – and I would like to place special emphasis on this – a common European policy would strengthen the stability of national educational policies to a large extent as it would create an external environment which can be quite independent of the fluctuations in internal politics, and through this, it can eventually increase the stability of objectives, means and institutions – while keeping change and adaptability in focus.

Gábor Halász  
Director General of the National Institute for Public Education

## IMPLEMENTING THE WORK PROGRAMME IN HUNGARY

If there was a very simple and convincing answer to the question implied by the title of this presentation, many would become complacent in the European Union as it would instil the hope that the policy objectives and tasks set by the EU can be effectively and easily achieved both in Hungary and elsewhere.

Let us do a bit of recapitulation here by taking a look at the three major objectives whose comprehensive concepts highlight the main policy directions defined by the EU for education: quality/effectiveness, access, and opening up. There are hardly any policy objectives that cannot be listed under these headings. The next question is what tools are needed for the 13 objectives organised around these three major issues to initiate real processes in the member States. The ambitions of the European Union are clear. The economic and social goals which are in line with the expectations of the various Member States are also clear. Is it possible, however, to translate these spectacular goals into measures triggering demonstrable changes in the work of educational institutions, the organisation of learning situations, the actual learning process and the student-teacher relationship? Naturally, the answer is very complex. We are familiar with the tools of the open method of coordination, which has received rather contradicting evaluations in the relevant literature. These methods are indirect. They provide thinkers and actors in education with aspects that shape their way of thinking and help creating a common language for the discourse about shared topics and issues. This enables us to act with more intelligence and wisdom, by learning from each other's mistakes, and to have a toolkit of sophisticated instruments which, by surpassing earlier methods, help the profession gain more praise than concern and criticism. The common objectives can be achieved only if they are translated into specific targets, i.e. indicators or benchmarks or reference values that ensure accountability.

Only those Member States can benefit from the leverage of being engaged in the Lisbon process that have taken the trouble to launch similar reforms organised around similar professional considerations. These countries have recognised the potential of the method of open coordination within the framework of their own systems. Subtle tools, i.e. the tools of empowerment, facilitating the cooperation of competent actors, feedback and accountability are necessary to encourage the increasingly independent professional actors to take up responsibility.

So what has the EU done for all these? The EU has set up working groups to launch the work of experts in the framework of international cooperation, and our Hungarian colleagues are now also engaged in that effort. They have experienced how difficult it is to find a common language even for researchers with experience in reading the international literature of the profession. They were the first to learn how difficult it is to reach consensus on agreed proposals based on common themes and methodologies shared with international colleagues. The same working group structure underlies the topics to be discussed by the afternoon workshops of this conference, and hopefully the discussions will reveal the results achieved to date, the policy proposals and expectations each

working group has formulated. This should provide an opportunity to discuss whether the findings from the joint European work are worthy of mobilising the wider public within the profession and initiating changes with a substantial effect on the teaching and learning process. An essential aspect of this work is to realise that we need to go beyond just effective rhetoric. There is general agreement nowadays that it is possible to talk convincingly about the introduction of new teaching / learning practice by showing the results.

The intensive work aimed to select and further develop the indicators which help the verification of results support the above process. This project has seen many previous examples both in the OECD and the EU. The first serious impulse did not come from the EU. The PISA survey made it clear for the EU that it is impossible to engage in a wider social and governmental debate about education, unless steps are taken to ensure measurability and comparability in addition to mere policy visions.

The indicators assisting comparisons and measurements are important tools in joint peer learning in an international context. These indicators are dreaded helpers of educational administration. Let us stop for a moment to recall the shocking effect of the PISA survey on our self-esteem. In 1996, in our first progress report for the EU, we reported that the educational system in Hungary was traditionally good. We did that with conviction and the EU confirmed that the educational system in Hungary was traditionally good. Of course, it was easy to believe that as we did not have convincing evidence on the quality of the functioning of the system. We focussed on a few outstanding results, our Nobel Prize laureates, Olympic champions in mathematics and science, our internationally recognised professionals, and we liked to believe that everything was all right – as that was good for us. Indicators help us talk about issues that really matter.

How could Hungary benefit from the EU's momentum? In addition to following the professional activities of the EU for two years, we endeavour to communicate the lesson learnt from the work accomplished so far with the help of the most far-reaching means of communication, conferences, and publications. Smaller groups in the profession have conducted a number of interesting debates. Work on the above topics has begun by establishing the present situation honestly and allocating tasks.

Our involvement in the decision making process of the European Union has shown us the extent to which the EU is divided by differing views, as well as the national problems experienced in the Member States which pose a challenge to those who take this process seriously or dare to shoulder it. The so-called benchmarks will reveal that although most of the targets are close to the Hungarian policy objectives, the EU may require a shift of emphasis in topics already being dealt with suggesting that we should look around with an open mind when addressing an issue. Identifying problems and accepting the common goals are only one side of the coin. We will gain real assistance from the joint work only if the tools are also selected jointly, and the impact on motivation and services within the profession is such that they will lead to substantial changes. Among other things, the exchange of good practices is a method where Hungary has a



great deal to do even within its own borders. We often highlight, as one of our strengths, that we have a rich pool of professional innovations and organisational and pedagogical creativity, solutions that meet European standards, experiments, but we cannot delay their dissemination or accessibility any longer.

Following the thematic approaches, it would be worthwhile meeting again to consider the key challenges together. In Hungary, the last few years represented a period of partial strategies and concept development. We now have very many technical documents which more or less go beyond the steps that are unavoidable when policy objectives are set, i.e. they are built on the assessment of the current situation, their objectives are linked to a clear vision, they aim to find an adequate set of tools, and these tools, accompanied by indicators, are suitable for making the actors accountable for effectiveness. Public education, VET and tertiary education have drafted their respective strategies. The tasks related to all these and the integration of disadvantaged children, embracing the information society and adult education must be combined in the consistent framework of a comprehensive lifelong learning strategy.

The benchmarks represent the most verifiable and thus politically and professionally “toughest” tool of the Lisbon process. Hungary participated in the Council of Ministers of Education for the first time when the quantitative targets of the work process were adopted. These help monitoring the progress made by the individual countries and the Community as a whole. Now the debate is about whether the European Union should set objectives for the individual Member States. In accordance with the compromise decision which has been made, each Member State should take up so much of the common goals as they believe they can afford, but they must make their undertakings clear and they are accountable for accomplishing the tasks undertaken.

By 2010 the proportion of early school leavers should be below 10% within the EU (EU:18.8% HU: 12,3% 2010 target: 10.0%)

This first benchmark is a very important one, and Hungary has recognised that. It draws attention to the issue of drop-out rates, which is undervalued compared to the seriousness of the problem. When this benchmark is being discussed, some professionals still say that there is nothing to do in this field, as Hungary’s position is good, our drop-out rates are lower than that of many European countries. I do not think that is an acceptable appraisal. We need to estimate our drop-out rates, and establish whether 10-15,000 children leaving the school system annually without qualification or final secondary school examination can be considered reassuringly low in *any* circumstances? Must we, may we, can we fail to address this issue with the intensity it requires? Over the last years, many measures were taken to prevent dropping out of school, but it has not been placed on the agenda as a key policy objective. I think it would be necessary to have it there. Apparently, the drop-out rate in Hungary is 12.3% compared to the EU average of 18.8%, so we might as well say that we have already done our share. However, it is good to know from the messages of statisticians that this 12.3% should not be taken seriously, as the system is unable

to provide answers to some basic questions. Therefore, based only on statistics, it is very difficult to monitor and handle those students that leave the system on a temporary basis or leave one institution for another while the school year is in progress. Therefore, the task is evidently to monitor students in a more reliable manner, which will be strongly supported by the introduction of individual educational identification codes. As regards indicators, the first step is usually to find a satisfactory situation, where the top policy objective is other than demonstrating the unreliability of indicators. We have to have trust in our own indicators, know their limitations, but must also be able to use them. The first action plans for the above benchmark are currently being designed. I hope that the communication of these to the profession will start as early as this conference.

By 2010 the number of graduates in mathematics, science and technology should increase by at least 15%, with reducing the gender imbalance. (EU: 25.7%, HU:10.1%, national target for 2010: +15,0%)

The second benchmark requires an increase in the number of graduates in technology and science. This issue was not raised in the policy discourse of the past fifteen years in Hungary. This work has highlighted that the favourable conditions, typical in the 1970s – when many parents who were professionals themselves wanted their children to build a career in technology or science in a period when Hungarian technology experts were very successful abroad – do not exist any more. In the period following the political changes, a clear devaluation began in these fields, and now we have less participants in technology and science training programmes than other Member States. It is not possible at this point to reflect upon the importance of this objective in detail. I only briefly mention that the high value-added products of the economy are mainly realised in technology intensive fields, and the paths to these fields lead through studies in technology, science and mathematics.

By 2010, at least 85% of all 22 year-old young people should have upper secondary qualification (EU: 75.4%, HU: 87.2%)

The third benchmark is aimed at increasing the number of upper secondary qualifications within the European Union. With 87.2%, Hungary surpasses the 2010 target already at the start. It is true though that most new Member States have similar or higher values. By reducing the drop-out rate, an increase of a few percentage points may be forecast in spite of the good initial performance.

By 2010, the number of 15 year olds with low attainment levels in reading skills should fall by at least 20% compared to the year 2000 level. (EU: 17.2%, HU: 22.7%, national target for 2010: 13.7%)

The fourth benchmark is the same as one of the PISA indicators. This is especially important for us, as this was the indicator where Hungary is lagging far behind, as many pupils from Hungary are classified as having inadequate

reading skills. The European Union considers this to be a factor jeopardising lifelong learning, and this group is not likely to be equipped with the essential skills to enter the labour market, and will not be able to select corrective learning paths without these skills. Therefore, this indicator and the definition of technical tasks to improve this indicator will require special attention.

By 2010, the average proportion of those who participate in lifelong learning should be at least 12.5% of the adult, working age population (25-64 year-olds) (EU: 8.5%, HU: 3.3% National target for 2010: 12.5%)

This benchmark turns the attention from public education to the world of tertiary education. Perhaps only few people know, but many suspect that adult involvement in learning in Hungary is very low. The range of learning opportunities available in Hungary are likely to be typically limited to those who like learning, and are more successful in their studies, which is narrower than what the domestic figures suggest. The EU target is 12.5%, and the proportion of adults involved in learning in Hungary is currently between 3 and 4%. Here, statisticians again reassure us that there is unexploited potential, there is room to interpret the indicator in other ways, which would increase the Hungarian indicator to as much as 5-6%. In connection with adult learning, an exciting dilemma for professionals is how participation in informal learning should be treated. At present, the question on informal learning is based on self declaration, i.e. the questionnaire asks whether the respondent was involved in informal learning in the recent period. If the answer is yes, the statistics will take that into account. Last year three hundred thousand people in Hungary declared having been involved in informal learning. There is justified doubt that there is still no consensus concerning the interpretation of this concept behind the data.

Investment in human resources. The Lisbon EU Summit called for a significant increase in the per capita investment in human resources.

The Ministry of Education has high expectations concerning this last indicator. Having declared that the funds allocated to human resource development should be increased, presently the focus is on funding education and funding the systems of learning and human resource development in particular. The background of this indicator is that by looking at education as investment, different ways must be explored to finance changes to improve the quality and effectiveness of education and access. One experiences both in Hungary and in other countries that if arguments and changes fail to take into account effectiveness, the chances to obtain additional funds are low in a climate where central budgetary resources are under pressure. It is therefore necessary to point out certain well defined aspects of the educational system where investments return, accountability is possible and measurable results may be achieved. More bargaining is needed between the Ministry of Financial, the educational decision makers at different levels, funding organisations and social partners, which should lead to an increase in resources that

will eventually improve the conditions of teaching/learning by taking into account effectiveness criteria. These are sensitive issues. The difficulty is that in cases where members of the profession manage to identify ways in which resources could be used more effectively, it is not certain that the rights and guarantees are also in their hands to use those resources in other areas more effectively. The benchmarks and the common European educational policy learning will support this very subtle advocacy policy with good practices, experiences in planning, implementation, evaluation, and comparability.

The above process is now in a phase of acceleration. Of course, the mobilising force of a European partnership where joint thinking is encouraged does not guarantee anything in itself. It is up to us – educationalists, policy makers and researchers – to capitalise on momentum achieved and use for the progress of this profession.

*István Vilmos Kovács*  
*Assistant State Secretary of the Ministry of Education*

## REPORTS ON THE WORKSHOPS OF THE NATIONAL EXPERT GROUPS

### A – Teacher Education and In-service Training

Having listened to the guidelines formulated by the EU working group, the group has issued its opinion on the following issues:

- Essentially, the EU principles provide the right answers to the Hungarian situation. It is therefore expedient to plan Hungarian developments by taking into account the EU guidelines.
- However, the emphasis should be different in some cases (e.g. as a result of teacher shortage, the EU needs *quantitative* development in the first place, while Hungary needs a *qualitative* one. The EU needs a *wider* thematic range of in-service training, while we need to make them *more focussed*).
- It is necessary to explore the relationships of EU principles, the domestic situation and the domestic lines of development.
- It is absolutely necessary to develop a national teacher training strategy which concerns both the teaching profession in general and the initial and in-service training of teachers.
- This strategy should address the issues of initial, induction and in-service training under one heading.
- The creation of the strategy should in all instances precede the amendment to the applicable regulation or legislation on this field.
- In the development of this strategy, it is expedient to create coherence between the activities of the various working groups (ministerial, professional, academic).
- For the dissemination of EU principles and international good practice in Hungary, it would be useful to create and keep together a network of experts to negotiate the interests of those who work at the various levels of teacher education and to find a common language.
- A national mechanism of *open coordination* needs to be developed.
- It is necessary to examine the compliance of the Hungarian educational administration system with relevant EU requirements.
- It is expedient to create a research, development and service network for teacher education.

For the accomplishment of the above tasks, grants should be obtained from the Structural Funds.

*Iván Falus*

### B1 – Key Competences

The participants of this session were educational researchers, university teachers, public education experts and heads of institutions. The working group looked at the key competences which were outlined in the presentation delivered by Mr Sándor Brassói, Hungarian delegate to the EU Working Group on Key Competences. Mr Vilmos Vass, member of the subcommittee addressing the European dimension gave a brief overview of the work done. Following that, Mr Zoltán Kaszás, head of the primary and vocational school called Centenárium Általános és Szakiskola analysed the opportunities and difficulties of competence development at school. As a guest speaker, Mr Benő Csapó, professor from the Pedagogical Department of the Szeged University, former Hungarian delegate to the EU Working Group on Key Competences described and assessed earlier processes. Many professionals gave input to the debate and shared their thoughts with their attending colleagues. In this context, the group working on key competences have adopted the following recommendations:

- The professionals who have participated in the work of this session should continue working on the areas outlined by the EU working group on key competences in a more organised form, in a workshop framework to promote a successful adaptation in Hungary.
- A clarification of terminology is unavoidable. As an urgent task, a consistent interpretation of the term “competence” and a reflexive, critical analysis of knowledge, skills and attitudes are needed.
- Development programmes developed along measurable, verifiable, operable objectives and indicators and underpinned by standard methods, tools and measurements are needed.
- It is necessary to build research, development and school based practice upon each other in a conscious and coherent manner and to organise implementation professionally.

*Vilmos Vass*

## B2 – Foreign Language Teaching

Following the presentation on the activities of the EU Working Group on foreign language teaching, the working group has formulated the following proposals for the eight policy recommendations of the EU:

**Increasing awareness of the importance of linguistic diversity:** Considering the increasing headway of the English language and the loss of interest in less widely spoken languages, the working group finds this recommendation important. In order to implement it, the incentives to be provided and the existing ones to be strengthened must enhance motivation to learn other languages in addition to the widely spoken ones (e.g. English, German). The recommendation concerning diversity would be supported by a study to define what languages are needed in what professions, as many disciplines build/built upon languages other than English. The lack of language proficiency examinations recognised by the state in certain languages (including official EU languages) due to the low level of motivation and / or the financial aspects of accreditation is a problem. The need to clarify the position of sign language was formulated as an additional recommendation.

**Promoting regional and minority languages and the languages of migrants from neighbouring countries:** This recommendation is closely related to the preservation of diversity, so the working group has extended the proposals made for the first recommendation to this recommendation.

**Well thought-out, clear purposes in language teaching:** In accordance with the objectives of the World-Language Strategy of the Ministry of Education, the working group has emphasised that the acquisition of foreign languages should take place in public education institutions in the first place, and students should be able to learn the terminology of professions at higher education institutions by building upon those skills. As regards this, the working group formulated a recommendation for the working group on teacher training, considering that teachers teaching foreign languages for special purposes are often not equipped with the professional skills required in the given domain.

**Removing the structural obstacles to transition from primary school to secondary school:** Both vertical cooperation (between primary schools and secondary schools) and horizontal cooperation (of secondary schools) would serve the removal of obstacles. The aim is to ensure that students can really continue the languages being learned, as opposed to beginning to learn them again. In addition, it is expedient to set up regional centres to ensure opportunities for continuing the learning of languages begun at primary school, including opportunities for distance learning.

**Promoting content based teaching:** This recommendation raised terminological issues in the first place. It is necessary to clarify and specify the Hungarian equivalent of the term “*content based teaching*”, as the currently used translation (“*tartalom alapú oktatás*”) is often difficult to interpret. The recommended terms to be introduced included “*tantárgyközi tanítás*” and “*kereszttantervi tanítás*” (inter-subject and cross-curricular teaching).

**Developing transparent assessment systems based on the Common European Frame of Reference:** The Hungarian language proficiency examinations recognised by the state should introduce as soon as possible the six level assessment system recommended by the CEFR. With the introduction of the two-tiered system of secondary school leaving examinations, this recommendation may be partially implemented. However, it should not be overlooked that there are other examining centres, and they need to be given an opportunity – by means of calls for applications, for example – to align their practice with the Frame. On the other hand, it is necessary to ensure that the examinations representing the same levels of the Frame cover the same levels of skills, i.e. they actually refer to the same levels.

**Introducing a mentoring system:** This recommendation is not related to the existing mentoring system, but the training of mentors. Examples to this latter exist in a number of places, but it is expedient to collect these practices and to assess the current situation. In the light of the experiences, the training could be extended to other subjects. In addition, it would be necessary to set up a network or forum where career (re)starting teachers could exchange their experiences.

**Bilateral or mutual recognition of language teacher degrees:** The working group has not formulated a proposal for this recommendation.

*Márta Fischer*

## **C – Information and Communication Technologies in Education and Training**

In the morning session, the participants were given an overview of the work done in Working Group C by Ms Andrea Kárpáti university teacher, Hungarian delegate to the Working Group, who described the problem points of strategic importance that play a key role in the activities of the Working group.

Diagnosing these problems, the EU Working Group highlighted the following areas:

- Creating and maintaining an IT infrastructure in education;
- Preparing students for using ICT;
- Preparing teachers for using ICT;

The EU Working Group deemed the following to be issues of strategic importance:

- Integration of ICT methods into the curricula vs. reducing the amount of the material to be taught;
- Issues of using ICT outside school;
- Promoting Lifelong Learning (LLL) with ICT devices;
- Dissemination of educational best practices in the widest public and the related problems;
- Supporting decision makers by providing information rooted in research.

In view of the above, it can be established that the themes listed fit well in the Hungarian situation, and the expected proposals to solve the problems may be helpful for Hungary.

The EU Working Group prepared proposals which are to be discussed and adopted at their next meeting in November. The Working Group proposed the introduction of new indicators to enable a better collection of data. The proposed new indicators are the following:

- Percentage of students using ICT in learning;
- Percentage of teachers using ICT in teaching;
- Percentage of lessons where ICT are used by teachers.

The EU Working Group has formulated four proposals for its November meeting:

- Coordination and integration of ICT policies with long term policy objectives for education;
- Creating a technical and professional support network in each country;
- Use of regular, centrally financed methodological in-service training systems;
- Regular research into ICT penetration and the standard of ICT use.

After the report, the participants added the following proposals:

- Creating an open resource centre with exercises and problems relating to general subjects, which may contribute to increasing the use of ICT by teachers (some of the material of this resource centre are available already)
- Improving the system of in-service training along the lines of methodology; (in progress, under Sulinet)
- Monitoring the major national ICT programmes and the quality and quantity of ICT use by learners and teachers, and analysing the findings to establish a strategy;
- Developing research into the use of ICT based methods and tools, engagement in international research activities.

*Péter Fehér*

## **D – Increasing Recruitment to Mathematics, Science and Technology**

The delegate to this Working Group gave a brief description of the work done so far, as well as the conclusions and recommendations of the working document Objective 1.4 “Increasing recruitment to education in science and technology” prepared by the Working Group. In the workshop, there was a lively debate, which can be summarised as follows:

- The prestige and social acceptance of careers in mathematics, science and technology are low and falling in Hungary. Creating and developing a national policy for mathematics and science is as important as having a policy for foreign languages and information technology.
- A purely methodological approach cannot lead to a solution; a change of paradigm is needed.
- It would be worth exploring the cause of the widening divide between humanities and natural sciences.
- In the public media, emphasis should be placed on providing information in the fields of mathematics, science and technology, due to its function of shaping citizens’ decisions. As a verifiable indicator, the proportion of information dissemination programmes could be used.
- Innovations in education and research in the field of mathematics, science and technology should be linked. The new law on innovation is an excellent initiative for that.
- It would be worth creating a database of Hungarian good practices and making them accessible to the public.
- Funds are needed to finance extracurricular study groups and programmes for primary and secondary school pupils whose aim is simply to gain knowledge and do not prepare for competitions. E.g regional travelling laboratories, buses equipped with games in the field of logic, science and technology should be sent in the neighbourhood of children who are not taken by their parents and teachers to museums and laboratories in other towns.
- Institutions building upon each other are needed to cater for the gifted and talented. E.g. the Students in Research movement is the basis of the network of scientific workshops, which is a tool to maintain the standard of creative engineering and research.
- It is highly important to train teachers, teachers in training, secondary school students and parents together. (STEDE: Science Teacher Education Development in Europe).
- Cooperation with professional associations and social partners is important. Grants and job creation are needed to ensure that increasing numbers of students enter higher education and remain in their career after graduation (e.g. for women with careers in technology).
- Teachers play a key role in career guidance.
- Teacher assistants and technicians are needed in the schools to make use of the potential of the Internet and experimenting in daily practice.

- More school equipment manufactured in Hungary is needed, and the already working small businesses need support. (At present schools cannot afford to buy high-end school equipment.)
- The principles laid down above should be enforced as soon as possible, in the most effective way, in the initial training of lower primary school teachers and other teachers and regular in-service training in the field of mathematics and science.

*Andrea Koltai*

## E – Funding

In the workshop of Working Group E on funding, the proposals made by the Working Group to date concerning fund raising for education and training and the more effective use of the existing funds were demonstrated. The proposals are not compulsory for the Member States.

In connection with the proposals concerning fund raising, the following example of good practice was presented.

### *Austrian example on involving private funds in higher education*

In Austria, tuition fees were introduced in 2001 to increase the funds available to higher education institutions. All students participating in any training programme, including those which lead to a degree as well as those which do not, must pay a tuition fee, which currently amounts to EUR 363 per semester. For foreign students different fees were established, subject to nationality.

In parallel with the tuition fee, a system of “academic allowances” was also introduced to provide social compensation for those whose social background warrants that.

In this system, the total amount of the tuition fee is refunded to those who receive a study grant from the state (in case of appropriate academic performance, eligibility for the study grant is subject to the social background).

The tuition fee is refunded, either in full or in part, to those students whose parents’ income is only slightly above the threshold set as an eligibility criterion for the study grant.

Administration is simplified by the fact that the allowance does not need to be applied for separately, as the eligibility criteria are reviewed together with the grant applications.

Nearly 25% of all students receive academic allowance amounting to EUR 75-363.

In addition to the system of academic allowances, student loans are also available to cover tuition fees. The state provides support amounting to 2% of the interest payable.

It should be noted that the tuition fees are refunded to the students from central budgetary funds, and the source of the support provided to the student loan interest is the same. Thus fund raising also means – partly and indirectly – the involvement of additional budgetary funds.

The discussion was characterised by general scepticism concerning the feasibility of the proposals both in Hungary and in general.

The participants noted that the present reform ideas in the field of education in Hungary (new Act on Higher Education) are not in full conformity with the proposals made by the Working Group, which raises another problem, notably the issue of effectively channelling the work done in the working groups, or the outcomes thereof, into the domestic public administration processes.

*Tamás Móri*

## F – Mobility and European Cooperation

At the beginning of the workshop, the participants could hear two presentations about the activities of Working Group F and the related Hungarian developments and the strategy for mobility. The expected date of finishing the development of this strategy is November; and it will have the following set of overall goals:

- Increasing the number of those who participate in mobility;
- Improving the quality of mobility;
- Improving access to mobility.

### *Summary of the workshop debate:*

The presentation on the framework of the mobility strategy provided a good basis to discuss the mobility issues which have the widest impact and gain the most interest, i.e. **reciprocity** (the balance between the grant holders leaving and coming to Hungary) and the **organisational background** of mobility. The debate led to the following conclusions:

Reciprocity can never be achieved fully. In an optimum situation, there would be an equal number of Hungarian grant holders travelling abroad, and foreign grant holders coming to Hungary in any area of education and training.

Creating an organisational background would be one of the main means to facilitate reciprocity. An adequate capacity to host grant holders and the related services are the preconditions for improving the flow of grant holders into Hungary.

The priorities of inward and outward mobility should be defined on the basis of a strategy reflecting the interests of Hungary. In some cases where Hungary should focus on sending rather than receiving grant holders, reciprocity is not an interest. It mainly applies to disciplines where the domestic training system does not offer appropriate opportunities or where the subject makes it necessary (e.g. Egyptology). In case of other studies, our interest is rather receiving grant holders (e.g. teaching Hungarian language and culture to foreign grant holders).

In the definition of the national priorities, we need to take into account the international trends: it is necessary to explore the target countries of mobility destinations, i.e. the existence of demand (and purchasing power) for Hungarian training in the medium term.

The trend whereby Hungary mainly receives grant holders from the less developed countries of the world and sends grant holders to the more developed ones is worth considering.

One of the major – and most apparent – obstacle to increasing Hungary’s hosting capacities is the low number of training programmes in foreign languages. In addition, the services offered to outgoing grant holders are generally better than the ones provided to foreigners coming to Hungary relating to their accommodation and integration. In this field, setting up a mobility centre covering all aspects of mobility would mean a major step forward, but the ideal

situation would be to create a “foreigner friendly” attitude within the Hungarian institutions.

Joint organisational thinking is needed: the evolving strategy should contain the experiences of organisations working with target groups that are outside the scope of this strategy, but have similar features. These include, for example, the voluntary sector or researchers. Cooperation might as well take the form of jointly organised training sessions.

The mobility strategy would help providing the right planning and decision making tools to those who organise mobility. This requires, on the one hand, indicators that enable the measurement of both the quantitative and the qualitative aspects of mobility, thus helping the definition of realistic targets, as well as the monitoring of progress towards achieving those targets. There is some progress in this field, as cooperation with indicator developers has begun at the level of the horizontal EU working group (Standing Group on Indicators).

*István Verses*

## **G – Open Learning Environment, Active Citizenship, Social Inclusion**

Ms Judit Szira, delegate to Working Group G outlined the main objectives set by the Working Group. Among other things, she explained that the long standing, important condition for a functioning European democratic society includes the openness of educational and training systems and their ability, in terms of content and methodology, to ensure the presence of the idea of democracy, including the importance of education for active citizenship, equal opportunities and social cohesion and the required content of school provision in school education, and to make them part of lifelong learning.

She reported that there were very many different solutions in the Member States in the fields of theory and practice alike. As the views on fairness and equal opportunities are different, so are the content and practice of teaching. The objectives set by this Working Group are worth considering in each member State.

In the working group, we tried to find proposals as to the function of the national educational policy, the points where intervention is needed in the Hungarian system of education and the content and methods of education for active citizenship, equal opportunities and social cohesion may appear. The following proposals have been formulated:

Vocational schools should be reformed so that modular competence-based skills can be in focus. This would ensure real opportunities for vocational school graduates. Vocational school provision should be practice-oriented in order to motivate the young people attending these schools.

Dissemination in the school community of resource materials, school equipment and in-service training programmes used successfully by international and domestic civil organisations. Creating discussion forums and pedagogical workshops on active citizenship, equal opportunities and social cohesion.

Organising accredited joint training programmes for teachers and parents to strengthen a kind of collective approach to school.

Integrating non-formal methods into formal teaching materials used by schools (transmitting values, behavioural patterns, critical approach, etc.).

Compulsory training sessions for teachers on tolerance and eliminating prejudice.

Review of teaching materials used by schools from the perspective of no discrimination and prejudice by a group of experts to preclude the teaching materials and teaching aids that may strengthen and re-generate the existing stereotypes and prejudices against Roma and disadvantaged people.

Skills and attitudes relating to citizenship should be incorporated in all levels of education.

Nationwide changes require the involvement of the national media.

*Angéla Kóczé*



## H – Making Learning More Attractive, Strengthening Links to Working Life and Civil Society

It is a problem that we cannot talk about a “learning society” in Hungary yet, because the majority of the adult population do not enter the world of learning – for a number of reasons not relevant at this point. This fact will lead not only to losing competitive strength on the international scene, but also widen those gaps between certain groups of society which appeared over the last decade in connection with the content and quality of education, traditional and computer literacy, access to information and the use thereof. Therefore, the measures to be taken should ensure to all, through links to specific lifelong learning opportunities, an opportunity to avoid the dangers of falling behind, marginalisation and social exclusion. To this end, the following proposals have been formulated in this session:

### ***Making learning more attractive***

It appears necessary to “fine-tune” the legal environment in order to promote adult learning, because as current regulations do not support and strengthen sufficiently the position of employees in their communication with the employers,

It is absolutely necessary to develop and introduce a funding system which is more flexible and user-friendly than the current one and can be adapted to the individual routes of lifelong learning.

It is necessary to ensure that the actors providing education and training equip the adults participating in their programmes with relevant skills that meet labour market requirements.

It is important to have individual pathways of learning which enable the widest range of users – in the light of their individual needs and opportunities – to finish their earlier studies successfully.

### ***Links to civil society***

It is necessary to fund research to reveal the potential of NGOs in education and training in order to use them as a basis for building cooperative partnerships which help the identification and activation of social groups that are far from the world of education and training and their subsequent integration into the learning society.

It is expedient to provide support to strategic and methodological programmes which are developed at national, regional and local levels and undertake to design and disseminate the cooperative techniques and methods to be used by institutions and organisations.

### ***Links to working life***

In order to improve employability, it is necessary to promote learning at work or at home (besides work), capitalising on the advantages of full time and part time forms of employment.

It is necessary to ensure to adult learners the recognition and validation of the outcome of non-formal learning.

*József Mayer*

## Indicators

The meeting welcomed the plan of the Ministry of Education to set up a Working Group on Indicators. The meeting supported the position of the speaker from the Ministry of Education, whereby the members of the working group should be developers, analysts, researchers, database administrators, statisticians and research methodology experts delegated from the various policy fields.

The meeting proposed that in addition to electronic communication and a common knowledge base, the working group should meet at least two or three times a year to discuss on the basis of the material submitted in writing and the agenda the adequacy of the indicators existing in the priority areas, the possible development of new indicators and their methodological alternatives.

The meeting first examined the needs for indicators arising in the various fields of indicators in terms of their relevance to education policy (why is an indicator needed? What can it prove?). This is a task to be performed by analysts, developers and researchers. Initiatives should come from the administrators of special fields. Only after that does it make sense asking whether the indicators for the given field are sufficient, possible to calculate, appropriate for the objectives set, or what sources of data are needed, and if the answer is negative, how much it will cost to rectify the situation.

The meeting agreed that the main task of the working group was to select the key indicators that describe the state of the education system, and enable the monitoring of the changes thereof. The tasks do not include proposals for output and outcome indicators for the measures of the NDP or the HRDOP. The key indicators can be used for measuring the indirect impact of developments financed from EU grants. These indicators must be in part the same as the OECD and EU indicators, because these are the basis of the external evaluations of progress in Hungarian education, and there is a significant – and deliberate – overlap between the two sets of indicators.

The selection of a few indicators from the large number of available statistics can be based on an *approved conceptual framework or research and analysis*. The indicators that may be generated regularly and with professional adequacy to provide reliable indications of the state, tensions and problems of the system of education in certain areas may be identified on the basis of partly the available literature and partly the analytical studies written at the request the competent public authority. In public education there is ongoing research in this regard, and it would be useful to have similar research initiatives in other sectors (e.g. higher education, VET, adult education).

The meeting has proposed the following topics to be discussed by the meetings in 2005:

- Review of ISCED categorisation and considering the consequences of modifications;
- Discussing the methodology of statistically monitoring the Bologna process in higher education with the higher education sector, the Central Statistical Office and competent analysts;

- Discussing the methodological background of national financial data appearing in international indicators, formulating and putting forward the possibilities and conditions of improvements;
- Discussing the indicators of drop-out rates and early school leavers;
- Developing a methodology for statistically monitoring migrant pupils;
- Developing a methodology for statistically monitoring student mobility;
- Examination of benchmarks relating to the Lisbon objectives from the perspective of the objectives that may be set for Hungary.

According to the position of the meeting, the secretarial duties of the working group should be performed by the Ministry of Education. Funds for the development of new indicators and data sources should be provided from the Structural Funds.

*Judit Fülöp-Kádár*

## **New Challenges for Teacher Education and Teachers – Horizontal Working Group**

The participants of the horizontal workshop agreed that the most important task was to develop a strategy for teacher education and in-service training and to set up groups of experts for that, even as a background institution of the higher education sector.

The task of the workshop was to interpret the new challenges facing teacher education and to formulate appropriate recommendations for them:

### ***The “pedagogy of mobility”***

Incorporating into the domestic teacher education the experiences teacher trainers gained abroad, making use of good practices and experiences in higher education;

Longer teaching practice abroad enhances student mobility, and it may become a career element, i.e. lead to advantages in pay and it could be recognised as professional experience. Experience gained abroad could be similarly validated in compulsory in-service training;

Practice abroad will help spreading the method of “on-the-job learning”.

### ***Education for active citizenship***

Education for active citizenship should be part of the initial training of teachers, constituting at least one module, and a topic of compulsory in-service training. This way education for (EU) citizenship would cease to be the orphan child of the education programme;

Functioning NGOs with useful programmes should provide local training for the teachers, and also for parents, in the school, and this should be part of the institutions’ pedagogical programmes;

The students of teacher training institutions should not only see the “trained” pupils and favourable circumstances of practice schools when they are teachers in training, but would also see schools struggling with real, problematic pupils;

The number of school psychologists visiting classrooms should be increased;

It would be important to create a network which co-operates with and is linked to higher education institutions and also engages in pedagogical research;

Extending the mentor’s role beyond their role in initial training to help freshmen and those who return to the profession. Mentors can do a great deal to support teacher self-development and to increase the professional skills required to teach pupils with special educational needs or migrant pupils.

### ***Science and mathematics***

The educational sector should lobby to convince the media to place emphasis on broadcasting programmes promoting science, and schools should make use of them in their teaching activities;

In-school in-service training programmes offer a range of insufficiently exploited opportunities, and the educational policy should promote these. From this respect, team work and pair work, which works well in many places, are important and enable teachers to solve pedagogical/professional problems jointly.

Proposed indicator: proportion of science subjects selected by students to be part of the final examination of secondary schools.

**Language teaching:**

The system of training schools needs to be expanded;

It would be necessary to enhance the mentoring function;

The teaching profession should support and help the development and dissemination of innovative projects conceived in the working groups. The projects would be developed by the teaching staff, in a team-work arrangement.

In the development work, special attention should be focussed on teaching foreign languages to pupils with special needs. This requires the involvement of special teachers. Practising teachers still face many open questions and development problems in early language teaching.

*Erika Cser*

**Co-operation with Social Partners – Horizontal Working Group**

The aim of this professional workshop was to discuss the issue of cooperation with professional civil organisations working in education. Of the civil organisations, the discussion mainly focussed on federations, associations and foundations engaged in nationwide activities in fields relating to education.

The workshop was quick at realising, looking at the wide range of participants, that in spite of their nationwide activities in accordance with their charters these organisations were unable to represent the profession as a whole.

Having established that fact, the experts tried to list the social partners who would be important for the working group to be involved in the work. After mentioning the actors in public education (pupils, teachers, parents), who are personally affected, they deemed it necessary to highlight the key role of the so-called regional organisations.

In order to ensure the implementation of the EU objectives for education and training, in certain cases, businesses, experts and expert groups working in government and its background institutions and professional associations may also be contacted and encouraged to voice their opinions.

In the workshop, the experts considered, as a separate issue, the ways and methods the EU working group could use to maintain links with the social partners. The discussion progressed from practical, specific ideas towards general techniques of application.

It is impossible to define generally applicable rules for establishing and maintaining contact. The actual methods always depend on the given task and the organisation, group or individual approached.

We need to endeavour to establish effective cooperation (making use of the potential of the information society). The full range of the available means of communication should be used, depending on the size and nature of the target group that is to be involved in a dialogue.

The following generally applicable principles have been highlighted:

It is important to locate, already in the preparatory stage, based on the priorities set, the social partners (organisations, various target groups, etc.) whose activities are related to the tasks.

In the course of implementation feedback is needed about the experiences and ideas of all stakeholders. It is important to analyse the experiences gained in the course of preparation and implementation to enable a transparent and complex evaluation of the process as a whole and all the issues based on the feedback.

It is desirable to clearly define the responsibilities, obligations, rights and opportunities of each actor.

The cooperation should not be limited to occasional contacts only. The continuity of contact is of key importance.

It is necessary to be open towards the media in the implementation of tasks approved by the working group, and it is expedient to draft a professional communication plan already at the design stage (e.g. separate communication strategy).

*Zsuzsanna Kosinszky*

## Equal Opportunities – Horizontal Working Group

There was a great interest in the working group on equal opportunities. The participants of the discussion were school principals, educational researchers and policy makers.

What does the realisation of equal opportunities mean in education? Everybody agreed that both the idea and objective to be realised should be to provide opportunities to all, including the disadvantaged and the groups facing marginalisation and exclusion, to realise their creative potential and talents. The principle and practice of equal opportunities in education enable the members of these groups to live and work with dignity, as active citizens in society.

In this field, there are plenty of tasks to be accomplished in the Hungarian system of education. The keynote address delivered by Mr Zsolt Pál, a teacher by profession, confirmed that statement. This subjective report highlighted, for example, the hardships, personal and attitudinal problems and obstacles people with disabilities must overcome, if they want to follow a career other than the usual, “disabled path”.

### **Questions and proposals:**

It is highly important to ensure that the interpretation of “disadvantaged” should be the same for all professionals, and it should not be weakened by subjective approaches and understandings. For example, Roma pupils should be considered disadvantaged, even if they are not disadvantaged socially. It is also important to have such a definition of disability that serves as a tool for solving the problems of the affected, as opposed to stigmatising them.

Shaping views and strengthening solidarity for the disadvantaged in society are of key importance. Schools must participate in this effort as model institutions.

Education should have a responsive, effective and rich methodological repertoire to deal with disadvantaged groups.

The time factor, i.e. the timing of necessary compensating interventions is also of key importance in the education of disadvantaged groups.

Legislative and financial instruments are equally necessary to facilitate the realisation of equal opportunities in education. These instruments may help schools avoid becoming a place to further widen social gaps and to reinforce the processes of segregation.

The measurements and measuring instruments used in education must be designed and further developed in such a manner that they cannot be used as the means of exclusion from schooling and society.

It is necessary to increase the recognition and appreciation of those schools and professionals whose work can provide models and examples in achieving social integration and equal opportunities, and their achievements should be promoted among the wider public.

The discussion raised a number of problems and tasks which require efforts for further consideration.

*Rózsa Mendi*

## Information and Communication Technologies in Education and Training – Horizontal Working Group

After the introduction of Mr Bertalan Komenczi, the participants continued in more detail the discussion of the proposals defined in the morning.

The participants agreed that the main condition for spreading ICT tools and methods is changing the mindset of teachers, which is a much larger task than “just” improving the state of repair of schools. To this end, new and diverse methods should be found and introduced to motivate teachers for ICT use.

The key proposals formulated in the session were the following:

- Development and implementation of a national strategy which unavoidably integrates the elements of ICT into education (thus joining the proposals made by other groups in the morning sessions).
- Creating a resource centre with exercises and problems which can be applied in the assessment of pupils’ performance with a minimum level of IT skills, and can also help the work of teachers. The participants indicated that there had been progress made, as a glossary of terms for all subjects in the primary school curriculum had been essentially completed.
- More emphasis on teaching educational technology skills, possible development and launching of a BSc programme.
- More marked presence of innovative school experiments through wider publicity, developing twinning programmes with European schools.
- Introducing and spreading e-learning methods in teacher training. There are ongoing experiments in this field (e.g. in the Multimedia Pedagogy and Educational technology Centre of the Science faculty of ELTE University)
- Setting up regional (county level) support centres to provide professional, methodological and technical support to schools (these may be based on pedagogical support services). Services could be provided via telephone, e-mail and online through the Internet, or directly on-site. It is important to emphasise that this would NOT be a solution to the problem of school based system administrators in the first place, but these services could provide that type of support as well.
- Compiling and disseminating a list of teaching materials and existing best practice. As a result of the various rounds of tenders and individual activities, many useful materials are being developed, but their dissemination is not ensured. Collecting these and making them available would significantly contribute to spreading ICT use. The participants deem it important to ensure the availability of films featuring best practice or parts of demonstration lessons, in CD-ROM format.
- Providing more support to already well functioning practice is of key importance. Naturally, this raises the question of who should be supported in the first place – active, successful and innovative users or those who lag behind. The participants highlighted the importance of building upon the learner’s active participation, which is an aspect that cannot be overlooked as IT skills can be very well used for motivating learners.

*Péter Fehér*

## Lifelong Learning – Horizontal Working Group

In present educational policies, lifelong learning constitutes a logical framework and a policy instrument which represents the most all-embracing view of education, as a subsystem of society. The participants of this working group became acquainted with the elements of the policy of lifelong learning in their meeting. The main components of lifelong learning as a paradigm are as follows:

- *Consistent focus on the individual:* emphasis is shifted from the service provider to the client, from the school to the learner – this element has especially great importance in cases where the school itself fails to assume responsibility for school failure.
- *It lasts from birth to death:* lifelong learning is a process that can take place in any phase of life.
- *It does not count on motivated learners only:* the target group is the entire population, but especially those who could not experience the positive impact of learning on daily life earlier.
- *It does not take place in traditional educational institutions only:* lifelong learning may take place in all arenas of collective cooperation – both in groups and individually.

What are the areas where intervention may facilitate the implementation of the lifelong learning strategy?

- *Competence development:* The initial stage of learning has a key role in shaping the overall attitude to learning, and it has an effect on subsequent stages of life.
- *A wider range of learning opportunities:* In addition to formal learning (traditional, school based), opportunities should be given to non-formal and informal learning, as well as the validation of the outcome of such learning.

What are the means of achieving these?

- Legislation
- ICT use
- Indicator development
- Teacher education

After listening to the keynote address, the participants came up with the following input:

- It would be important to apply a set of instruments that enable the keeping up of early childhood interest in the world in subsequent stages of life, which would ensure continued motivation for learning.
- Methodology was identified by many participants as the key point. A number of research findings show that there is a divide between the pedagogical methods known in theory by teachers and the ones they apply. Therefore, teachers play a crucial role in the day-to-day implementation of

the strategy. Participants are of the opinion that a lifelong learning strategy should not be dictated by politicians, its development requires broad based social consensus.

- The draft of the lifelong learning strategy assumes the existence of a rich repertoire of tools, although it is not available in many cases, as experience has shown. A strategy built upon it would be delusive.
- In addition to measuring competences, the continuous assessment of teacher performance is a tool that may be used in practice quite easily and could make a substantial contribution to the implementation of the above strategy.

Győző Nehéz

## **II.2. THE STRATEGIES OF THE EDUCATIONAL SUBSECTORS WITH SPECIAL EMPHASIS ON THE ATTAINMENT OF THE LISBON OBJECTIVES**

### **Opening Address**

*Summary of the address by Gergely Arató,  
Political State Secretary of the Ministry of Education*

A few years ago, when our accession to the European Union was on the agenda already, and we talked about the European Union and education, we were told that we “did not understand the problem”. The documents establishing the European Union made it clear that education was outside the competences of the Community as it was a national remit being a highly sensitive issue in the light of so many cultures and nations constituting the EU. This is a field of an abundance of practices, school systems and methodologies, and in addition to creating competitiveness and satisfying other specific needs, these are key areas for safeguarding a nation’s culture and identity. This explains the intention of the countries establishing the European Union to remove the domain of education from the group of those that fall or may fall within the competences of the Community, and this approach has been confirmed by the documents establishing the European Union since that time.

However, certain needs arose “from behind”, and they required the adoption of a certain co-ordinated policy for education. We know what these requirements are: they are the needs relating to competitiveness. It has become clear by the 21st century that education is a fundamental issue of competitiveness. If we are to meet the challenges of a new economy and the new knowledge based society, either in a national, or in a European framework, the only chance we have is to increase our investments in human resources, and it must be done by ensuring effective results for the economy.

The question whether this situation is good as it is, i.e. is it appropriate to discuss education and competitiveness in the same breath, is often raised. I personally think it is good. The objectives we otherwise set for education are social and cultural objectives and objectives which relate to equal opportunities. These objectives cannot be fulfilled and attained, unless this type of competitiveness is present in education.

As new Member States, we are still in the process of getting accustomed to the philosophy that the European Union represents. In private conversations and professional dialogues, it is often asked whether EU membership serves our purposes. In my opinion, the objectives set by the European Union for education are the same as the national objectives of Hungary. Competence-based education, the modernisation of vocational education, a student friendly higher edu-

cation leading to competitive degrees/qualifications, creating the conditions of life-long learning are without exception objectives which, although they appear in an EU framework, translate into additional opportunities for this country.

The method of operating these educational programmes in the EU is noteworthy and by all means illuminating. Co-operation in the field of education is extremely important, because it establishes a culture of co-operation which is new even within the European Union. As it is prohibited to adopt a common policy in this field, the method of open co-ordination provides a framework for a planning process where the Member States participate in the development of joint programmes in a manner characterised more by co-ordination, co-operation and the search for common solutions than by regulatory aspects. This does not mean that there do not exist plenty of rules, as in the European Union everything is carefully delimited and described. However, one can trust that the culture built upon this type of co-operation and co-ordination will come as a new mode of operation for the EU, and it may subsequently become successful in fields other than education, too.

To sum up, for actors in education it is a significant step forward that the EU has recognised and admitted the fact that education is a key aspect of competitiveness. For us, this opens up new opportunities which add value to and help achieving our own policy objectives in education. Our hope, identically to the reason for organising such conferences, is that the type of dialogue launched at the Pan-European level about educational issues and the shared objectives and methods that may help make the whole of Europe competitive and successful will continue within the borders of the member states, and make a contribution within the Hungarian educational policy to creating a more equitable, more effective, and more competitive educational system offering even more opportunities.

### **II.2.2. The Lisbon Objectives in the Medium Term Strategy for the Development of Public Education**

*Summary of the presentation by János Sipos,  
Deputy State Secretary for Public Education*

At the Lisbon Summit, the heads of state and government of the European Union set the objective that the European Union must become the most competitive and dynamically developing knowledge based society in the world, which is capable of sustainable economic growth through the creation of more and better jobs and stronger social cohesion. The Lisbon Summit also issued a position paper requiring that lifelong learning should play a crucial role in fulfilling this objective.

In accordance with the principle of open co-ordination, Member States must implement the policy objectives set for education at a Community level by adapting them to their own conditions, within a national framework.

Member States are given feedback on the performance of their educational and training systems using reference values, or so-called benchmarks, suitable for the relevant and objective evaluation of results. The five benchmarks adopted by the Council of Ministers of Education are the following:

1. 10% reduction in the EU average of the school drop-out rates by 2010.
2. An average increase by 15% in the number of graduates in mathematics, science and technology by 2010, involving a higher rate of participation of women.
3. Increasing the average proportion of young people completing upper secondary education in the 22 year-old age group to 85% by 2010.
4. 20% reduction in the proportion of 15 year olds with low level reading skills by 2010, compared to the level experienced in 2000.
5. Increasing the proportion of (adult) lifelong learning (training, in-service training) participants to 12.5% by 2010.

For many decision makers in the Hungarian educational system, the experiences of the Lisbon process have had a strong stimulating effect. The documents laying down the policy directions of the Ministry of Education reflected in many ways to the common European challenges in anticipation of receiving structural funding.

The status report forming part of the Ministry's medium term strategy for the development of public education highlights the problems that require major policy intervention. For the implementation of the strategy, the Ministry of Education has been launching targeted programmes which may lead to changes in conformity with the objectives listed.

### **1. Effectiveness of education and the development of basic skills**

The results of domestic and international surveys reveal that the foundation period of public education devoted to developing basic skills is laden with serious problems. From the perspective of success in the labour market, the performance of Hungarian public education is lagging behind the desired level regarding the development of those competences whose value is continually increasing (e.g. IT, foreign languages, co-operative skills, learning to learn and certain social competences).

One of the key objectives of public education is to lay the foundations for lifelong learning. One way of achieving this is to develop the key competences that will enable individuals to face throughout their lives situations requiring adaptation or learning, in the broader sense. The overall renewal of the methodological resources of schools and teachers requires strong focus on the development of key competences.

### **2. Inequalities**

Educational statistics and research findings indicate that Hungarian schools are in most cases unable to offset the impact of pupils' social disadvantages on learning outcomes by using their pedagogical tools. There is a high degree of segregation present in the education system. Integration and pedagogical skills may help reducing inequalities. Integration requires the promotion of organisational arrangements that allow the teaching of pupils with different abilities and skills together. It is not enough to provide for the teaching and education of currently segregated children and pupils (Roma and pupils with special needs) in mainstream institutions; it is also necessary to ensure that all educational institutions in Hungary are prepared for providing educational services that ensure successful learning.

### **3. Quality and quality assessment in education**

In the past years, the testing of a quality improvement programme aligned with European models and based on self-assessment, self-improvement and partnership was completed. The experimental stage, which was essentially based on voluntary participation, is now over; however, a quality improvement scheme which reflects all EU guidelines and would be applicable to all educational institutions has not yet been put in place. Three areas need further development: the national system of assessment and evaluation, which must be brought in line with the National Core Curriculum and the requirements of state examinations; the system of local quality improvement by institutions; and the regulations for the system of programme development and local programme application. This will ensure the availability of professionally and pedagogically sound programmes for schools, as well as the compliance of these programmes with the applicable regulations and professional requirements; and such programmes will guarantee the quality of professional adequacy of local curricula.

### **4. The state of the teaching profession**

In the past decades, the teaching profession underwent devaluation in all respects. The development of the teaching profession should be built upon a professional vision which takes into account the needs of present-day society and economy. The requirements of initial training, in-service training and specialist qualifications for teachers must be harmonised with that. A standard teacher training programme as the primary means of developing teacher competences must be launched.

### **5. Applying information and communication technologies**

In spite of the development programmes already implemented, there are shortages in the application of information and communication technologies by schools. IT equipment is not available in required amounts. It is especially typical in institutions catering for large numbers of disadvantaged children. The provision of support services for the operation, maintenance and replacement of IT devices still awaits resolution. In extending the use of information and commu-

nication technologies, schools teaching disadvantaged pupils and schools working in small communities should be given priority. Educational content development and services should enable differentiation by target group.

### 6. Infrastructure

Most of the buildings used by education in Hungary need rebuilding or refurbishment. Educational equipment is likewise inadequate. In the network of public education institutions, building and reconstruction basically means the renovation of buildings and the related infrastructure. Development efforts must include the provision of computer software and hardware to institutions, teachers and managers. New equipment must be state-of-the-art, and must comply with the criteria of professional adequacy, functionality, feasibility and its use must be harmless to human health.

### 7. Cost-effectiveness and governance

In the Hungarian education system, the available resources are typically underutilised compared to the overall effectiveness of education. As the system features low cost-effectiveness, public education development must concentrate on raising the standard with the resources it currently has, rather than increasing the proportion of GDP allocated to education. In handling the problems of cost-effectiveness in education, the co-operation of communities and institutions has a key role to play. There are weak links between the central, regional and local mechanisms of planning and decision-making. The present public administration reform also calls for the review of the administration of public education. Achieving efficient and democratic administration in the public education system requires an effectively functioning public education information and statistical system. Nearly all objectives relating to the development of public education presuppose improvements in the quality of institutional (school) and local level administration.

## NATIONAL AND EUROPEAN STRATEGIES FOR REMOVING NATIONAL OBSTACLES IN HIGHER EDUCATION

*Summary of the Presentation Delivered by József Sztítás,  
on behalf of Béla Mang Deputy State Secretary for Higher Education*

In elaborating the concept for the administration and development of higher education, the major factors to take into account include:

- human rights guaranteed in our Constitution,
- the National Development Plan,
- the Government Programme,
- the Act on Higher education with its amendments and the new draft of the legislation;

- the development of education and more specifically higher education
- the developments of the past years.

The process is unfolding against a background of historic social-economic transformation aimed at realising the knowledge based society and knowledge based economy in line with related EU actions and endeavours.

### 1. The economic challenges of the knowledge based society

The trends of transformation emerging gradually after agricultural and industrial societies ("post-industrial", then "service" or "information society") are referred to collectively as the "knowledge based society", or "knowledge society" in short. Besides the qualitative change in the human use of physical and intellectual energies, to the benefit of the latter ("manufactures are subordinated to mentofactures,... the brain, the spirit and the mind become the key production factors" – Burgoy), another significant restructuring process is moving forward. Following agriculture (80-85%), industry (30-40%) and then services (75-80%), the predominant branches of the last decades of the 20<sup>th</sup> century, the weight of **knowledge intensive industries** has been continuously growing in the employment structure of the most developed countries. ("The weight of US production (in tonnes) has somewhat dropped over one hundred years, but its value has multiplied" – Greenspan). In many countries it is already as much as 40%, and 50% of all new jobs are created<sup>32</sup> in the same countries.

The statistics of developed countries show the expansion of **massive enrolment rates in higher education** and **lifelong learning** as of the 1960s. By the end of the 1990, 45 percent of the relevant age group participate in higher education. The changing conditions, in particular the relative decrease of public funding, have triggered reforms in higher education. In the late 1960s, students were the main agents of change, now it is the Ministry of Education. Change concentrates on the structure of education (institutions, qualifications, timetables), management, funding and control, enrolment and drop-out rates, financial support to students, curriculum, and internationalisation. In the case of Hungary and Europe, the challenges arising from the economic-social transformations are reinforced by the competitive disadvantages manifested in the fields of productivity, innovation and higher education (productivity, 1995: USA=100, Japan=83, Germany=79; only 5% of innovative companies considered information from universities or other higher education establishments as being a very important source of information; foreign students 2000: EU=450,000, USA=540,000 (more students at advanced levels in engineering, mathematics and IT, with doctorate qualifications).

### 2. The European response – the Bologna Process

Attempts to co-ordinate higher education at a European level date back to as early as the 1950s. As student numbers began to grow, and with EU integration and the American challenge, efforts to promote **mobility** have been intensifying

<sup>32</sup> European Commission: 2003. , "The role of the universities in the Europe of knowledge". COM (2003) 58; [http://europa.eu.int/comm/publications/archives/index\\_en.htm](http://europa.eu.int/comm/publications/archives/index_en.htm)



since 1980 with a view to bring about more flexible labour markets. As of 1988, a European Credit Transfer System (**ECTS**), a **tool** for improving the recognition of studies pursued abroad and mobility was gradually developed under the ERASMUS Programme (the credit system was first used in the US). The European Commission included the ECTS into its proposal for the Socrates Programme, and it has become an element of the European dimension in higher education.

The endeavours of the European Union are also expressed, for example, in the white papers and green papers adopted in the 1990s: "Growth, Competitiveness and Employment" (1993), "Teaching and Learning: towards a cognitive society" and "Life and Work in the Information Society: Focus on Human Resources" (1995), "Accomplishing Europe through Education and Training" (1996), "Education – training – research: the obstacles to transnational mobility" and "First Action Plan for Innovation in Europe" (1997), "Agenda 2000, for a Stronger and Wider Union".

In 1997, the Lisbon Convention on the Recognition of Qualifications Concerning Higher Education in the European Region was adopted (**Diploma Supplement**). All these serve integration and *mobility*, which is one of the main sources of *agility, creativity* and *innovation* required increasingly in a climate of accelerating development. In the development of these processes, great significance is attached to the realisation by 2010 of a coherent, compatible and competitive **European Higher Education Area** promulgated by the Bologna Declaration (1999) and the **European Research Area** set as an objective for the Union by the Lisbon European Council in March 2000. The specification of the Lisbon objectives in education are detailed in the report submitted to the Stockholm European Council (March 2001). The Bologna process in education is described by Objective 3. According to the Bologna Declaration, for the realisation of a European Area of Higher Education, it is necessary to co-ordinate the higher education policies of the participating countries to achieve the following:

- a system of easy-to-compare qualifications in European higher education,
- two-tiered training (undergraduate, graduate),
- standard credit system,
- promotion of mobility,
- encouraging European co-operation in the field of quality assurance,
- promoting the European dimension in higher education,
- lifelong learning,
- involving students and higher education institutions in the process of accomplishing the European Higher Education (and Research) Area,
- making the European education area more attractive and more competitive,
- reform of doctoral programmes,
- enabling the use of domestic grants and loans abroad.

### 3. The evolving Hungarian response

For several decades, **developments in Hungary** have typically followed the processes emerging in developed countries *with delay*, and with deficiencies. Unfortunately, so far we have not taken advantage of the benefits of that

approach, although the economic-social costs of innovation are much higher than those of taking them over (Japan used this knowingly for modernisation). It is no accident that the emergence of the industrial revolution required the resources supplied by large territories (colonies). Today a breakthrough is not possible even at a continental level, so European integration is not a process freely undertaken. It is a compelling necessity, as well as the only chance for Europe, and thus for Hungary.

In Hungarian higher education, the development of a **quality management system** began already in the early 1990s. Pursuant to the authority granted by the Act on Higher Education of 1993, tasks relating to *the accreditation of institutions and programmes* (creating and launching tertiary education programmes, issuing opinions on qualification requirements) were added to the responsibilities of the Hungarian Accreditation Board (MAB). The MAB prepared a **quality inventory** which takes stock of the entire higher education system in Hungary. In this effort, *inter alia* 89 working institutions, 68 university and college faculties, nearly 2000 higher education programmes and over 200 higher level qualifications were examined. According to the MAB qualifications, nearly one quarter of all higher education programmes meet international standards, and 70% of them passed the quality test. The remaining 30% are either new higher education programmes, or their deficiencies may be rectified. With the amendment to the Act on Higher Education in 2000, the MAB has become responsible for assessing the applications of university and college teachers. Between 2000 and 2003, the Board issued opinions on 594 applications for university and college teaching positions, of which 404 were found worth supporting.

One of the means of loosening the rigid traditional training system and ensuring more freedom and mobility to students (intra- and inter-institutional opportunities for cross-over) is the **credit system**, whose introduction was provided for by Parliamentary Resolution 107/1995 (XI. 4.) and, based on that, Act LXXX of 1993 on Higher education and the 1996 amendment thereof. Its introduction was regulated by Government Decree 90/1998 (V.8.) (repealed) and *Gov. Decree 200/2000. (XI. 29.)*, still in force; it was generally introduced as of September 2003. Another useful means of promoting mobility is issuing **Diploma Supplements** to help the identification and validation of the qualifications obtained. The Hungarian version was developed with the involvement of the working group co-ordinated by the Hungarian Equivalence and Information Centre of the Ministry of Education, and the information booklet containing the description thereof was published in 2000. As of 25 June 2003 (Art. 97(8) of the Act on Higher education), "at the request of students, higher education institutions shall issue a Hungarian language Diploma Supplement in accordance with the Diploma Supplement developed by the European Commission and the Council of Europe. At the request and expense of students, an English language Diploma Supplement must also be issued.") The Ministry assists the issue of Diploma Supplements by institutions through co-ordination and provision of software and forms.

Several thousands participate in the framework provided by the main organisations and programmes of **student and trainer mobility** (Socrates/Erasmus, Leonardo da Vinci), supported by considerable EU grants. In many instances it is proper to say that Hungary is one of the most active participants in the programme, both as a coordinator and a partner.

The development scheme serving the implementation of the Bologna Process and the modernisation process of higher education in Hungary was undertaken in the autumn of 2001, under the AEHEA (Accession to the European Higher Education Area) Programme. Following a number of versions and clashes of opinions, the Government adopted on 25 June 2004 the **Hungarian Universitas Programme** containing the main components agreed by consensus (and some of the debated ones), the regulatory principles of the new Act on Tertiary education. Some of its new terms and elements are:

- new training structure in higher education,
- output driven and competence based qualification framework,
- National Bologna Council,
- establishment of higher education institutions,
- "budgetary higher education organs" with special legal status,
- capacity accreditation,
- Managing Authority,
- student status,
- allocation of state sponsored placements,
- training grants may be spent on covering the tuition costs of studies abroad,
- legal remedy for students,
- creating a trainee system,
- salary incentives for trainers,
- need to increase the amount of research grants,
- involvement of private capital in the financing of the Universitas Programme,
- EU funds allocated to higher education under the National Development Plan should be taken into account to an increasing extent.

In order to speed up the otherwise slow process of legislation, a Government Decree on the **introduction of a multi-cycle, linear training structure in higher education** was published on 31 August 2004. At present, Hungary, like many countries in continental Europe operates a dual or parallel structure in higher education, where the university level and the college level are separated at the input. This year tertiary education has taken extraordinary efforts to switch over to the new training structure. Only six higher education programmes (general medicine, dentistry, pharmacy, veterinary surgery, architecture, law) remained unchanged in the so-called single structure. The first cycle of the training is generally a three-year initial training programme (BSc.), within which 103 higher education programmes are defined by the Decree (as opposed to the current 480 higher education programmes). Of these, approximately 110 applications for launching a total of 34 initial training programmes have been submitted by 26

institutions in the fields of agriculture, technology and information technology, defence and health care. The ones receiving a positive opinion from the MAB may be included in the admission information brochure for the year 2005. Additional initial training programmes may not be launched before September 2006.

A national strategy for **lifelong learning** is presently being drafted.

The first national **law on innovation** (for the *promotion of research and development*) and the **new Act on Higher Education** have reached the final stage of preparation. In addition to the above, these regulations will hopefully further modify the framework conditions for higher education institutions so that Hungary will eventually belong to the vanguard of countries implementing and benefiting from the Bologna process, as opposed to being the rearguard.

### **Correspondence Between the Strategy for the Development of Vocational Training and the EU Work Programme for Education and Training**

*Summary of the presentation of János Jakab,  
Deputy State Secretary for Vocational Training*

#### **1. The current situation of strategy development**

In addition to the sectoral policy of the Ministry of Education, taking into account the specific economic and employment policies is also of crucial importance for the development of vocational education. Although the development of the vocational education system is a continuous task, it is necessary to determine the priorities, from time to time, to respond to the challenges arising in the course of time. So far development concepts have been mainly characterised by efforts to handle crises, on the one hand, and to meet the demands of the domestic labour market, on the other. With the elaboration of a strategy for the development of vocational education, we wish to change this practice to make it more forward looking and deliberate.

Our accession to the European Union has imposed additional obligations on us as the development of premium quality vocational education and training is a vital part of attaining the objective of creating a knowledge-based Europe.

The strategy for the development of vocational education elaborated by us is not restricted to mainstream vocational education. It contains more general concepts which apply to vocational education as a whole, including forms of provision existing outside the school system.

The guiding principle of this development strategy is to support the reduction of social inequality in the field of vocational education by using the instruments of vocational education, through the joint implementation of the common development tasks of public education and higher education, the implementation of the national strategy for employment and human resource development. The key development objectives are laid down in the development document, and they influence fields, such as management, maintenance, funding, the institu-

tional and structural issues of the vocational education system, the details of renewal of content, and the field of infrastructure and human resource development.

The long-term development of vocational education cannot be broken down to trade groups. Therefore, the ministries in charge of vocational qualifications should be involved in the accomplishment of the short and long term tasks assigned to the ministries with most responsibility for vocational education, i.e. the Ministry of Education (ME) and the Ministry of Employment and Labour (MEL).

The detailed elaboration of the overall strategy is influenced by a range of uncertainty factors. Therefore, we can only undertake to set the main directions, or to define a framework, in such a manner that the solutions reflect in all instances the national specifics of education, the demands of the domestic labour market, and at the same time can be aligned with the common initiatives launched in the field of education and training in the European Union, and the method of open co-ordination.

In addition to the statements made on the state and trends of learning and training, this strategy, based on a status report, will provide a summary of objectives and tasks, and will allocate public funds to the implementation thereof.

It will define measures to enable individuals to exercise their right to lifelong learning so that it can make the most effective contribution to increasing the competitiveness of society, individuals and the economy.

## **2. Key components of the development strategy**

### *Development principles*

In the definition of development principles, fundamental emphasis was placed on successful integration in the labour market and the continuous fulfilment of the needs of a changing economy, the *policy of lifelong learning*, whose foundations are laid down in the entire period of public education. Mainstream vocational training, the initial period of public education and even pre-primary education, are part of this.

Support should be provided to the development of basic skills and key competences within the framework of mainstream education, with particular emphasis on the skills required by the labour market – above all, proficiency in foreign languages and computer literacy – and the *competences* that are essential for personal life, as well as communication skills.

The issue of transparency is of equally outstanding importance. It is expressed through the mutual recognition of qualifications, and also facilitates student mobility.

It is necessary to lay down and support the establishment of the co-operation and networks of higher education institutions and other institutions providing adult education, which cannot be realised without *a uniform approach to the development of the educational system*. The methodological development of

adult education and the related distance education and the creation of a technical and curricular background require considerable and continued investments.

As regards lifelong learning, it is essential to establish a quality improvement framework and, building upon that, a quality assurance framework, and these frameworks should be extended to adult education beyond the realm of higher education.

### *Development objectives*

In public education, the key objective is to lay down the foundations of lifelong learning. To this end, it is necessary to develop those key competences that will make individuals capable of facing throughout their lives situations which require adaptation or learning, in a broader sense.

The emphasis should be placed on the development of physical skills, practical applications of theoretical knowledge, thus increasing the motivation for learning and the interest in learning a trade.

In drawing up the medium term development plan for vocational education, the tasks defined in the Human Resource Development Operational Programme (HRDOP) of the National Development Plan (NDP) have a key role to play as this programme enables the use of EU Structural Funds to carry out developments. The intention is to attain the overall goal through measures addressing a number of areas.

One of these is the further development of the modular training system, which ensures the possibility of exit from and return to the various levels of vocational education in the interest of labour market integration.

Under the NDP HRDOP, there will be investments in infrastructure with a view to changing the present fragmented system of vocational education, which is difficult both to fund and operate. With the development of Regional Integrated Vocational Training Centres, an efficiently and economically working, multipurpose and multifunctional network of institutions will be created to meet the most up-to-date needs of youth vocational education, adult training and in-service training, which will be able to respond to the changes in the labour market. It will induce real cooperation and planning among the partners involved in the various tasks.

In the field of adult training – with co-financing from the European Social Fund – the calls for applications relating to job creation and the development of entrepreneurial skills, and the programmes for the system development of adult education considerably expand the scope of training and strengthen the institutional background.

As a rightful expectation of economic actors, future employees must be able to adapt flexibly to the labour market, which has necessitated immediate intervention into the system of vocational secondary education. This intervention required the reconsideration of the objectives and tasks of vocational secondary schools providing training to fulfil the requirements of the primary labour market, as well as the changing of the location and providers of practical training, in addition to the pedagogical modernisation of mainstream vocational training. In view of the fact that due to its practical nature, the technical and pedagogical

objective of this form of training is the acquisition of basic technical skills and the reinforcement of competences, it was necessary to review and optimise vocational secondary school class sizes and group sizes in practical training.

The modernisation of the content of vocational secondary school provision is in keeping with the measures of the NDP HRDOP concerning the modular arrangement of the material to be taught, the vocational education model made up of partial qualifications, and the development of practical training provided at business organisations.

#### *Development tasks*

It is essential to develop the system of vocational education, to strengthen practical training, and to align training with the needs of the economy.

The transformation of the qualification structure into one with a modular structure will provide an opportunity for repeated return to vocational education. In parallel with the expansion of the modular system, simultaneous investigations are needed into how the acquired competences /completed modules can be validated in higher education, with special regard to higher level (technikus) qualifications.

The urgent tasks include updating the National Qualifications Register and reducing the number of vocational qualifications. In connection with these, a central registration system and an EU documentation system of examinations need to be developed.

In vocational education, the problem to be urgently solved is how labour market demands can be met by the current system of schools and institutions, which is so difficult to finance and operate, and is excessively fragmented and articulated, and only appropriate for the training provided by large companies earlier on. Therefore, it is necessary to promote the creation of those practical training centres (TISZKs) that are capable of ensuring the co-ordinated work of business organisations and educational institutions.

Initiatives are needed to further improve the system of teacher and vocational trainer education and in-service training. It is essential to improve the content of information technology in education, as well as the teachers' knowledge of information technology.

*New forms of advocacy* should be developed, with the involvement of partners collaborating in the development of vocational education, in order to improve the relations between vocational education and the economy.

A *multi-channel funding system* needs to be developed to satisfy the differentiated needs of vocational education and to stimulate structural change.

### **3. Contacts, collective bargaining**

In order to create wide based social support for the development of vocational education, we provided an opportunity already in the initial phase of strategy planning for the Vocational Education Sub-committee of the National Interest Reconciliation Council (OÉT), the National Vocational Education Council and the National Public Education Council (OKNT) to issue an opinion and a position.

The publication of the previous version of the strategy on the Internet also served the extensive debate. The proposals and the opinions received about the development of the vocational education system have been incorporated into the final strategy. In the planning phase, we invited the relevant ministries to express their opinions in order to ensure the necessary governmental co-ordination; the aspects of vocational education development concerning adult education have been drawn up by the MEL.

Opinions on the finished draft were issued by the national chambers of commerce and the professional/trade associations.

For the Government, a draft government decree was drawn up which contained the strategic measures to be implemented by involving the ministries responsible for vocational education.

This strategy is linked to the existing strategies, and it cannot be separated from the ongoing development processes, and for example the Europe Plan, the National Development Plan (2004-2006) and the LLL Strategy.

### **4. Measures formulated under the development strategy**

Briefly, the key measures serving the fulfilment of the strategic objectives – with the involvement of the ministries responsible for vocational education – are as follows:

#### *Strategic measures up to 2008:*

- A system ensuring the opportunity for further vocational education must be considered and tailored to the needs of those who hold vocational qualifications, building upon primary school education.
- The efficiency and effectiveness of the funding mechanisms of the vocational education system must be subjected to a review, and proposals must be made for the modernisation of funding.
- Modular training programmes must be developed, and the conditions for the introduction and application thereof must be put in place.
- Simultaneously with the extension of the modular system, it is necessary to look at ways of validating knowledge acquired through further education in higher education – with particular emphasis on technician vocational qualifications.

#### *Strategic measures up to 2013:*

- To implement the concept of lifelong learning, it is necessary to ensure to individuals, in all phases of their lives, massive access to the various levels and forms of education, the development of mainstream adult education, and the validation of knowledge acquired earlier.
- A multi-channel funding system must be developed for vocational education, which is able to satisfy the differentiated needs of vocational education and stimulates structural change.
- New forms of advocacy must be developed with the partners collaborating in the development of vocational education.
- A complex information system must be created, which can provide up-to-date information about vocational education to provide a basis for domest-

ic developments in vocational education, and to ensure the monitoring of programmes financed from domestic and international funds.

- It is necessary to continue building the system of integrated regional vocational training centres with the involvement of EU funds.
- It is necessary to review the system of vocational examinations, and arrangements must be made for the establishment of a regional system of institutions to ensure the operation of a system of vocational examinations independent of the trainers.

### Educational IT Strategy in the Light of EU Objectives

*Summary of the presentation of Gábor Miltényi Head of Unit of IT in School Education*

The aim of the Educational IT Strategy is to create an educational IT network, IT devices and educational methods that meet the requirements of a modern knowledge-based society, and to provide efficient support to the work of learners and teachers participating in school education and tertiary education programmes, and to enable the introduction and use of information systems supporting education in order to ensure efficient help in the optimal use of public and other educational resources.

The vision of IT in education: the educational sector must develop to a level where it can provide its services to society by training a labour force with sustainable competitiveness, greatly relying on state-of-the-art ICT, in a manner that meets the challenges of the information society in terms of content and methodology. Being based on modernised organisational models and processes, as well as high-end IT systems and infrastructure, the administrative background of the educational sector must become capable of cost-effective operation and the provision of quality services.

The changing structure and institutional reform of public and tertiary education mean a qualitative change as well as an IT challenge. IT developments must be based on a widely accepted and communicated IT strategy. As regards the content of education, its main objectives are:

- Competitiveness in the EU, educational content meeting the challenges of the information society;
- Establishment of modern, ICT based methods in education;
- Equipping human resources (teachers, trainers) with skills enabling ICT use;
- Effective training of those who participate in education and training to use ICT;
- Providing sufficient infrastructure;

Objectives for the Ministry of Education:

- Increasing efficiency through the modernisation of organisation (BPR/BPM, paper free office, staff and cost reductions);
- Improving effectiveness (quality management, managerial decision making, etc.)

- Modern, up-to-date solutions, supporting adaptability;
- Up-to-date planning and funding built upon controlling methods;
- Cost-effective, sustainable solutions, creating a sound balance between decentralised and central tasks;

#### Speeding up

- 5% of existing occupations are replaced every 5 years;
- The number of occupations not requiring ICT skills fall by 5% every second year;
- The earnings generating capacity of occupations not requiring basic ICT skills is around the minimum wage.

#### Characteristics of changes in skills

- A professional skill, once acquired, becomes obsolete within 10 years;
- The amount of employment-related skills shows an annual 32-fold increase on the Internet;
- The number of work stations connected to the Internet doubles every year;
- Accessible bandwidth keeps increasing.

#### Change of paradigm

<i>Industrial society</i>	<i>Knowledge based society</i>
Facts, data, rules	Skills and competences
Transmission of closed, final, textbook based knowledge at a single time	Lifelong process with knowledge networks
Fixed, homogeneous group based learning	Learning in flexible, heterogeneous groups (individualised)
Teaching in a frontal arrangement	"Constructivist" teaching

#### EU Lisbon objectives;

- Europe must represent the highest standard in the field of education and training to provide a worldwide reference for the quality of educational and training systems and institutions;
- European educational and training systems must be sufficiently compatible to ensure opportunities of cross-over for all citizens, who should be able to exploit the diversity of educational and training systems;
- Citizens should be able to validate within the entire territory of the EU any qualification, knowledge and skills acquired in any Member State in the course of their career or their studies;
- Lifelong learning should be available for European citizens of all ages;
- Europe should be ready to co-operate with other regions to gain mutual benefits, and it should become the most popular target for students, scientists and researchers living in other parts of the world.

#### Ensuring access to information and communication technologies (ICT) to all.

In connection with the provision of the appropriate tools and educational software, action is needed in a number of areas. As a basic condition of quality education, all schools must be equipped with the adequate infrastructure, which

would enable full utilisation of ICT. This should include equipment, devices for broadband communication (Internet/Intranet), and the general maintenance thereof. In addition, services covering a wide range of educational requirements should be ensured: high standard educational content in digital form, educational software, long-distance and local (virtual and real) services, tutoring, counselling, adequate level teaching and guidance support. From the perspective of the full utilisation of innovative ICT-based teaching and learning techniques, there are also other conditions of great significance. These are included in the second key task:

ICT should be used to improve the standard of education. The supported practices must be those where ICT has a good impact on teaching and learning. This is necessary, because educational systems should incorporate learner centred methods which recognise fully the different learning styles of students, as well as the different pedagogical requirements. In this context, it is necessary for teachers to receive support for performing their continuously expanding duties.

It is important to assess the ways and extent of ICT use, as well as how ICT may influence the outcome of learning processes (acquisition of skills and knowledge).

Decision makers must be supported at all levels to ensure that they address the topical issues of educational policy, such as the involvement of new groups of learners, innovation, European and international co-operation. They need to be provided with the means to implement ICT-based changes in the curriculum.

### ICT projects in education

<b>Objectives, tasks</b>	<b>Results</b>
<i>Provision of broadband Internet access</i>	<i>Broadband Internet access is provided to all public institutions:</i> <ul style="list-style-type: none"> <li>• Migration of 2301 terminals by 30 September 2004</li> <li>• Connection of another 1000 terminals by the end of 2004</li> <li>• 5500 public education institutions by 2005</li> </ul>
<i>Developing ICT infrastructure</i>	<i>Increasing the number of computer laboratories:</i> <ul style="list-style-type: none"> <li>• NDP Regional Operational Programme 2.3 (HUF 12.2 billion)</li> <li>• Phare Programme (HUF 4.8 billion)</li> <li>• SuliNet Programme</li> <li>• Innovative Schools (HUF 0.3 billion)</li> <li>• Decentralised calls for proposals (HUF 0.3 billion)</li> <li>• Tea-trolley Programme 2004 (HUF 3.3 billion)</li> <li>• Capitation grants for IT developments as of 2005 (HUF 4.5 billion per year)</li> <li>• 120 - 130,000 new multimedia PC by 2006</li> </ul>
<i>Teachers' in-service training</i>	<i>Support for teachers' in-service training and asset purchases:</i> <ul style="list-style-type: none"> <li>• Spring 2004: ICT-based in-service training for 10,000 teachers</li> <li>• 2004 - 2006 competence centred and ICT-based in-service training for 40,000 teachers with grants to finance asset purchase</li> <li>• Sulinet Expressz tax allowance</li> </ul>
<i>Services relating to digital content</i>	<i>Sulinet Digital Resource Centre:</i> <ul style="list-style-type: none"> <li>• Digitalised teaching materials for general subjects taught in the 7th-12th grades</li> <li>• 8 subjects</li> <li>• Examples, animation, demonstration films</li> <li>• Supplementary databases, background information</li> <li>• Methodological aids, lesson plans</li> <li>• Content to be modified on an individual basis</li> <li>• Forum, chat room, opportunity for collaboration</li> </ul>
<i>Electronic administration systems</i>	<ul style="list-style-type: none"> <li>• The IT background of educational administration must be developed to a level where the operative / administrative processes of Hungarian public and tertiary education (and, indirectly, those of the Hungarian society) can be aligned with the principles laid down in the strategies for information society, MITS and e-Europe concerning e-government</li> <li>• Promoting the use of opportunities provided by the new information and communication technologies (ICT) and the best organisational practices, and making their use widespread are fundamental objectives in Hungarian education. The related overall goals are the following: <ul style="list-style-type: none"> <li>• Increased efficiency (BPR, paper free office, staff reduction)</li> <li>• Improved effectiveness (quality, managerial decision making, etc.)</li> <li>• Spreading modern, up-to-date solutions to ensure competitiveness in the EU and increased adaptability.</li> <li>• Implementation of sustainable solutions, creating a sound balance between decentralised and central tasks.</li> </ul> </li> </ul>

## Eliminating Segregation in the European Union – Integrated Education

Summary of the presentation delivered by Bernáthné Mohácsi Viktória,  
Ministerial Commissioner

The integrated education programme forms an organic part of a comprehensive educational reform whose central elements include equal opportunities. In the past two years, the Ministry of Education took significant steps to put an end to the segregation of Roma and otherwise disadvantaged pupils, adopted amendments to legislation and launched technical programmes to strengthen the integrative processes in society. The Office of the Ministerial Commissioner Responsible for the Integration of Disadvantaged and Roma Children was created in August 2002 to perform these tasks.

### 1. Preliminaries of integrated education:

#### **The launching of the integration programme was motivated by several factors:**

The PISA survey (Programme for International Student Assessment) conducted in 2000 under the educational programmes of the OECD tested the performance and labour market opportunities of 15 year old pupils in 31 countries. The survey provided shocking lessons for Hungarian education: of all European countries, **the Hungarian system of education provides the least equal opportunities for children coming from poor families and having parents with low levels of qualification.** There are serious differences between the school attainments of the children of parents with the lowest and the children of parents with the highest status. Considering the chance to have access to a final ('maturity-type') examination at secondary school, there is a 50-fold gap. The inequalities experienced in education do not only affect the quality of education, but also influence competitiveness in the labour market, and generate social conflicts.

The conflicts accompanying this divide in society appear as early as the primary school stage. A survey made in 2000 drew attention to ethnic and social segregation, which can be often experienced at the primary school level: one third of Roma schoolchildren constituting 10% of the total primary school population attend classes with Roma majority.<sup>33</sup> The approximately 770 homogeneous Roma classes are attended by some 9000 Roma children.

In addition to in-school segregation, segregation among schools is not an unknown phenomenon either: educational institutions admitting disadvantaged children have the lowest prestige in communities, and they are the most poorly equipped ones, in terms of human resources and infrastructure.

After primary school, disadvantaged children attend vocational schools providing unmarketable vocational training, and having graduated from these, they are unable to meet the labour market requirements.

<sup>33</sup> Havas Gábor-Kemény István-Liskó Ilona: Cigány Gyerekek az általános iskolában [Roma children at primary school]. Budapest, 2000, Oktatókutató Intézet [Education Research Institute], Új Mandátum Könyvkiadó.

The mitigation of social inequalities is impossible, unless equal opportunities are provided for all to acquire and develop the competences required for learning. At the same time, the conflicts which are concomitant with the divide in society reveal that in addition to the qualitative development of education (IT and foreign language teaching, infrastructure improvement, etc.), new norms and values must be demonstrated to reduce discrimination in education (co-education, anti-discriminatory aspects, positive discrimination, etc.).

Economic development demands schools to make the most effective use of the potential of education, in order to enable the integration of groups who face the risk of exclusion from society, and to ensure their active labour market presence. One of the conditions of adaptation to changing economic circumstances is the existence of marketable skills in society, and the key to it is education.

The 2002 amendment of the Act on Public Education and the related decrees are significant because they represent an attempt to create a coherent system with levels building upon each other from kindergarten to obtaining a college/university degree to ensure equal opportunities. This coherent system has anti-discriminatory aspects and positive discrimination based on liberal values in place.

### 2. Measures to promote equal opportunities

#### 2.1. Kindergartens

As the key to success at school is kindergarten education, equal opportunities measures must also address kindergarten education. Research findings prove that 11 percent of Roma children do not attend kindergarten even after the age of 5. The reasons are primarily the expensive services and shortage of capacity in those communities where the number of children is growing – in contrast to the national trends.

As of September 2003, disadvantaged children have been receiving free meals at kindergartens. In addition, the new Act on Public Education has made the admission of disadvantaged children to kindergartens, afternoon provision and residence halls compulsory.

Under the Regional Development Operative Programme of the National Development Plan, grants have been made available on application, to increase kindergarten capacities and to improve the infrastructure of educational institutions.

These measures may put an end to the established practice whereby educational institutions refuse to provide education to a child on the grounds of lack of capacity or unfavourable social background.

#### 2.2. Integrated education

In November 2002, two new forms of organising education were added to the earlier regulation on the operation of educational institutions (Minister of culture and public education Decree 11/1994 (VI.8) MKM) (Articles 39/D, 39/E, Paragraphs 54. (7)(8)(9) and Articles 39/D and 39/E of Minister of culture and

public education Decree 11/1994 (VI.8.) MKM amended by Minister of education Decree 57/2002 (XI. 8.) OM). With these, the intention is to encourage institutions to provide integrated education to disadvantaged pupils through the provision of capitation grants.

In the framework of **training for skills development**, schools adapt to the needs and preliminary knowledge of pupils in providing assistance to skills development, improvement and catching up with other pupils, and thus improve the chances to enter further education. The amount of this capitation grant in 2004 is HUF 20,000.

As of September 2003, **training for integration** may be provided in grades 1 and 5 of primary schools and grades 9 of vocational schools. The amount of this capitation grant in 2004 is HUF 60,000.

Children participating in these programmes are taught according to a pedagogical programme defined in the regulation, together with non-disadvantaged pupils, in the same group.

The training for integration includes the pedagogical system of training for skills development with the difference that the capitation grant requires the meeting of stricter requirements of proportions in co-education.

The aim of the integration programme is to put an end to segregated classes, and to introduce differentiation in the organisation of education together with pedagogical practices which contribute to the academic success of disadvantaged pupils, thus decreasing the number of early school leavers.

Institutions providing integrated education receive professional support from the National Educational Integration Network (NEIN), through co-ordinators seconded to the regions. Currently the NEIN operates 45 flagship institutions called "model institutions" in the regions with the largest Roma populations, and these provide technical assistance to the schools in the surrounding communities to implementing integrated education.

According to relevant statistics, 8776 pupils in their first, fifth or ninth year of schooling started their training under the integration programme, and another 24,117 primary and vocational school pupils participated in training for skills development in the autumn term of 2003. By the autumn term of 2004, the number of pupils participating in such programmes had doubled.

### 2.3. "Utolsó Padból" [from the back benches] Programme to reduce unjustified statements of disability

A frequently applied method of segregating Roma pupils is to direct them to special schools or classes (earlier called "remedial"). At present one out of five Roma pupils are declared disabled, while the corresponding percentage for their non-Roma peers is only 2%.

It often happens that the expert committees disregard the generally accepted threshold of 70 IQ points to state mild disability, and send children with higher

scores to special schools. The outcome of measurements may be greatly influenced by the fact that many children are examined in county towns, in an unfamiliar environment, after having to travel for long hours to get there. The parents of children native speakers of 'olah' or 'beas' generally do not request that the child should be examined in the native language. Although all disabilities must be supported by medically demonstrable evidence, in many cases there is no evidence that the most fundamental medical examinations have been completed.

Moreover, a recent comprehensive survey of schools maintaining special classes reveals that one third of these classes are not taught by special teachers – although the law requires that – and in nearly one third of them, groups are combined at a level which is in conflict with the law. (The law permits the teaching of pupils from not more than three different grades together in special provision; in spite of that, many schools teach all lower primary (grades 1–4) or upper primary (grades 5–8) "disabled" pupils together, and there are some schools where all grades from 1 to 8 are taught together.)

The Ministry of Education launched the *Utolsó Padból* Programme to review the situation of children declared disabled without a good reason.

The initiative under this programme covered the development of Expert Committees, the re-examination of children in several phases (and sending them back to mainstream schools, if possible), a review of the means of measurement to ensure their independence from cultures, the development of a new capitation grant to provide special support to mainstream education to which the children are sent back. The rules for the declaration of disability and the rules for the provision for pupils declared disabled have been rendered stricter in applicable legislation.

Following the re-examination of pupils in special classes 11 percent of all children stated to have mild disability are recommended to return to mainstream education as of September 2004. The number of children sent back to mainstream provision has quadrupled compared to the previous school years (2001/2002 and 2002/2003).

### 2.4. Higher education

As of 2005 disadvantaged young people may be granted admission to the state funded training programmes of universities/colleges, provided that they achieve the score required for admission. In practice, this would mean that whereas the costs of the university/college education of children with a wealthy background are paid by parents, the same costs are covered by the state for poor children. In addition to the support provided to facilitate entry, students admitted this way would be helped by mentors in the course of their studies, in order to overcome their initial disadvantages and to catch up with the other students.

The present proportion of Roma students in higher education negligibly exceeds 0. Research findings show that in 2002 1340 disadvantaged young people wanted to continue their studies in tertiary education. Including those who



completed secondary education, the expected number of students entering university/college education with support will be between 1500 and 2000 as of 2005.

#### *2.5. Further measures:*

As a new element, the Act on Public Education amended in September 2003 includes the **prohibition of segregation** at school. The new regulation provides an opportunity for identifying **indirect discrimination**. The applicable provisions were subsequently included in Act CXXV of 2003 on Equal treatment and the promotion of equal opportunities.

The Act provides a definition for “disadvantaged background” (Art. 121). Earlier regulations did not contain a definition for “disadvantaged”, which led to a situation where the grants intended for disadvantaged pupils missed their target.

The “**tanoda**” [informal place of teaching] method is also a new element in the Act on Public Education. It promotes the spreading and development of extracurricular activities for the success of disadvantaged, in particular Roma pupils. Under the Roma community centres sub-programme of the Phare programme (HU-01.01-01) entitled “Social Integration of Disadvantaged Youth with Particular Emphasis on the Roma Minority II” and Component 2.1.4 of the HRDOP, considerable support has been provided to the “tanoda” initiative.

As of September 2003, free textbooks are available for the needy. This measure greatly reduces the costs of families with difficulties at the start of the school year.

In accordance with the amendment to Minister of culture and public education Decree 32/1997 MKM, pupils may not be exempted from foreign language learning on the grounds of Roma minority education.

More prudent public administrative measures may be expected concerning the issue of private student status (Art.7).

With the amendment of the earlier regulation on the requirements of the final (‘maturity-type’) examinations of secondary schools, Minister of education Decree 14/2003. (V. 27) OM incorporates the knowledge of Roma culture and history into the standard examination requirements for history, literature and grammar. As a result of the open call for applications published in 2003, two teaching material packages were prepared in 2004 in the field of civilisation. The syllabus of Roma Civilisation, which has been adapted to an integrated pedagogical environment, will be first introduced at the lower primary level (grades 1–4) (in single structure education), and will appear in the curricula of the upper years of primary school (in single structure education) and secondary schools later.

Real opportunities have been created for the actual presence of Romany and “Beas” languages in school education. While the data from the year 2003 survey of the National Public Education Assessment and Examination Centre (OKÉV) show that Roma children could learn their native languages in 3 public education institutions only in rural areas, the number of such schools have grown to 20 by now.

### **3. Reception of the integration programme**

Upon the request of the Ministerial Commissioner, the impact of desegregation measures were assessed in 624 primary schools by the Tertiary education

research institute, under the direction of István Kemény and Gábor Havas, in the spring of 2004.

**70% of the school principals interviewed agreed to the introduction of the capitation grant.** The rate of approval was higher than the average (**83%**) among those who work in institutions where the maintainer applied for the capitation grant, and **60%** of the heads of those schools that have not started integration training yet expressed their approval. Discontent was mostly expressed by those principals who are afraid of being excluded from the benefits of integration due to the high proportion of disadvantaged pupils in their institutions.

School management faced opposition among the teachers in 29% of the schools introducing the capitation grant, and 24% of the schools faced the resistance of non-Roma parents.

Consequently, the reception of integration at school surpasses all expectations.

## CLOSURE: PANEL DISCUSSION

The conference held on 8 November was concluded with a panel discussion which on the one hand intended to offer insight with the help of outside experts into the engagement of Hungary in the activities of the working groups and, on the other hand, it intended to demonstrate how the open method of coordination may have specific impact on the implementation of the Lisbon objectives in Hungary. The participants of the discussion included

Sándor Brassói, deputy head of department in the Ministry of Education, member of the working group on the development of key competences

Andrea Kárpáti, teacher in ELTE University, member of the working group on spreading ICT in education

Zoltán Loboda, head of department in the Ministry of Education, who, as a representative of the Euridyce Programme in Hungary, knows well the Community activities pursued under the Work Programme

Mária Schléger-Tóth head of department in the Ministry of Education, expert on activities relating to VET

Krisztina Dobos, chief executive of the Public Foundation for Modernisation, practising secondary school teacher and

Gábor Halász Director General of the National Institute for Public Education, one of the best Hungarian experts on the educational activities of the European Union.

The first issue addressed in the discussion was the awareness of the Work Programme in the wider professional community, including school teachers. The participants believed that the Hungarian professional community is not sufficiently familiar with the Work Programme. A debate started on the question whether practising teachers need to know a programme which was essentially developed for policy makers and educational administrators. One of the arguments for the need for publicity was that the evaluation criteria used in the reviews of application for EU grants included the relationship between the activity to be supported and the major goals of the Work Programme. According to Mr Halász, the most important thing is familiarity with the assessment of the current situation and the objectives which triggered the Lisbon process, as opposed to familiarity with the work programme; notably the danger of the European region's dropping behind and becoming a less active participant in the global competition in the field of creating a knowledge economy, unless it steps up the efforts to face the challenges of the knowledge society.

The second item of the panel discussion was the question whether the open method of co-ordination was an adequate tool for implementing the broad social-economic goals set in Lisbon. The participants highlighted from different perspectives that open coordination, as a method, represents a new paradigm compared to the earlier approach or working method of the EU: the debate of bureaucrats is slowly replaced by the joint activities of researchers, innovators and bureaucrats in the committees. According to Mr Halász, the earlier advocacy activities are undergoing a slow transformation and the implementation of the Work Programme requires new activities to be added to the old practices of

the EU working groups (development of indicators, analytic discussion of educational methods, peer learning, peer review, etc.) This raises the issue of competences that national experts delegated to the working groups are required to have. Ms Kárpáti, Hungarian member of the working group on ICT quoted examples to illustrate what a debate between research and development professionals and traditional administrative bureaucrats could mean and what kind of cooperation could evolve in the field of developing indicators.

The discussion touched on the ways of using the outcomes of the working group activities in the development policies of the individual Member States. The participants established that the approval of reforms at the Community level required strong political legitimation. It was also mentioned that the results of the working group activities would only be translated into practice in the Member States relatively slowly. This situation has somewhat improved by the fact that the experts can transmit their experiences gained in the working groups to their national "fields" relatively rapidly, through their own research, educational and development activities.

The final question concerned the preparation for the report on the Work Programme to be submitted to the EU by the Ministry of Education and the national working groups. The discussion made it very clear that the Member States were accountable for their commitments under the programme. The report must be organised around the benchmarks and indicators. This will not be the first report, as a similar national report was made in 2003 concerning life-long learning. Reporting based on indicators should be understood as a special learning process for each country. According to Mr Brassói, the Member States will be confronted with their own progress in meeting their commitments. There will certainly be commitments that Hungary will not be able to deliver fully, but the report will also give account of significant achievements in many areas.

The discussion as a whole implied that active participation in the Work Programme would lead to considerable results in the development of Hungarian education, and especially the process based on the indicators and the evaluation of the results would mean an opportunity for learning and gathering experiences in terms of the organisation and working culture of Hungarian education.

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