

**STRATEGY OF THE GOVERNMENT OF THE REPUBLIC OF  
HUNGARY FOR LIFELONG LEARNING**

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# 1. MAJOR STRATEGIC TRENDS IN THE NATIONAL DEVELOPMENT OF LIFELONG LEARNING

## 1.1. *Essential goals and requirements*

By formulating the strategy for lifelong learning the Government seeks to determine the long-term courses of human resources development in compliance with European Union planning, particularly for the period between 2007–2013.

The strategy is a complex development programme whose **main objective is to determine the action and support guidelines**

- for catching up with the European Community and the developed countries drawing on the tools of the knowledge-based society;
- for the ongoing improvement of economic competitiveness, the creation of the conditions for sustainable development by facilitating the attainment of skills, competences – with special regard to adaptability – and qualifications required for the learning and employment of prospective employees;
- for the diversified development of the conditions of education and training in order to mitigate the regional differences in labour force supply and quality that arise from the disparity of economic development;
- for the more intensive labour market and social integration of the most disadvantaged strata and groups by facilitating the attainment of the skills and qualifications necessary for their employment;
- for a more progressive institutional, asset and methodology development in education and training, and the promotion of physical as well as virtual access to learning opportunities for all citizens by enhancing the efficiency of the system of financing.

In improving the system of conditions of lifelong learning, the following **requirements shall be observed:**

- *the State should facilitate the implementation of social equality*, and should ensure the freedom of the individuals so that they can choose freely from the training opportunities and study in accordance with their abilities and field of interest;
- *the education and training system should be transparent to all participants*, and it should facilitate access to training and provide the continuous funding of training irrespective of the individual's financial capacity;

- it should also provide non-repayable resources taking into account the individual's financial capacity and life situation, while at the same time efficiency of the utilisation of state resources should prevail;
- in *developing the acts* on public education, vocational education, higher education and adult education attention should be paid to the objective that these should effectively foster the enhancement of lifelong learning in compliance with the stipulations of the strategy;
- in pursuing the strategy for lifelong learning the *assertion of social partnership* should be granted marked attention.

## ***1.2. Promotion and development of lifelong learning***

### **1.2.1. Targeted support for disadvantaged groups in the labour market**

From the perspective of lifelong learning disadvantaged groups and strata should be granted equal opportunities. Unequal conditions primarily affect groups with a low level of qualification or unskilled groups and people with a disability, however, women who receive child care aid or child care fee payments, the Roma, the elderly and persons disadvantaged due to other reasons (migrants, homeless people, formerly imprisoned persons, etc.) should also continuously be offered education and training programmes and measures that promote the equalization of opportunities.

The fulfilment of this set of tasks requires the following measures:

- the development of incentive programmes for the youth and adults with a *low level of qualification* – primary school education at the most – in order for them to complete school or achieve the corresponding development of their basic skills and to attain a vocational qualification;
- the development and introduction of incentive programmes for *people with disabilities* to enable them to attain a vocational qualification and to enhance their chances of success in the labour market and expand their job opportunities; the development of a support scheme for education and training investments for training institutions that offer education and training programs over and above the average extent to *people with disabilities* and those with a permanent health problems; the ongoing provision of targeted support for educational and training institutions with a view to the implementation of a *technical and communication accessibility project investment*;
- the drafting and introduction of continually operating targeted programmes for the *Roma population* to mitigate the high rate of dropouts and the number of those with a low level of qualification and to enable them to attain a vocational qualification in or outside the school system; solutions that encourage individual and institutional interest should be designed by providing priority support to programmes that equally ensure training and employment;

- the development of targeted programmes of further training, retraining and programmes providing vocational qualification and adult education services to those *re-entering the labour market after their return from child careleave*; these targeted programmes should promote the interest of individuals, training institutions and employers, and also facilitate the re-entry to the labour market and the choosing of a new workplace/job/occupation;
- the development and introduction of targeted programmes for people disadvantaged due to other reasons (migrants, homeless people, formerly imprisoned persons, etc.) – by promoting the interest of individuals and training institutions – which facilitate the attainment of a vocational qualification and provide assistance in intensive job search and in finding a job. The Government counts on the involvement of special institutions specialised in providing assistance (e.g. social employers, asylums, etc.) and civil and charity organisations in the programme.

### **1.2.2. Adaptation of the education/training system to the needs of the economy**

The *creation of the system of occupations* is the task of each Member State in the European Union, at the same time the future prospect of the free movement of labour calls for the harmonisation and the transparency of the system of occupations and their contents.

- Vocational qualifications that can be acquired through training in and outside the school system – by means of formal and non-formal learning – and are recognised by the State as well as the programmes, curricula, teaching tools and methods that ensure their attainment should be modernized by applying a modular structure and competence-oriented vocational requirements.
- A national recognition system and an equivalent validation system of vocational qualifications not recognised by the State should be developed in conformity with the EUROPASS system; the recognition system of knowledge accumulated and vocational education received through non-formal learning – not documented formally – i.e. the so-called competence card system should be devised.
- The career information counselling network should be extended, and an even more extensive access – made available at the centre of each employment agency – should be ensured to facilitate the development of knowledge and skills with respect to career guidance.
- The strengthening of ties between higher education and vocational education institutions and the actors of the economy should be fostered along with the more accented representation of economic requirements in the training programmes.

### **1.2.3. Development of the content and methodology of education and training**

For the expansion of lifelong learning the provision of educational and training programmes and services should be improved in compliance with the demands of the various target groups, with special regard to the ongoing modernization of the content of education and training. Modernization ought to be supported by government measures and resources, particularly in the following fields:

- The development of state-of-the-art, modular and competence-oriented methods and curricula, the planning of programme systems, methods and curricula that secure open educational paths.
- The full modernization of the teacher training and in-service training system to enable teachers and trainers to acquire the skills, competences and the methodological and topical knowledge that allows them to productively transfer renewed knowledge content that is tailored to the changing requirements.
- The development of distance education systems and programmes as well as e-learning programmes and curricula differentiated by target group and training tasks.

#### **1.2.4. Improvement of the quality of education and training**

The quality of public education, higher education, vocational education and adult education should be improved and guaranteed by the introduction and operation of comprehensive and uniform measurement/assessment and quality development systems. More specifically:

- *the improvement of quality assurance and quality management* should allow individuals in the course of lifelong learning to have recourse at all times to education and training institutions that provide up-to-date services of equal value;
- quality development processes already commenced in the school system should be extended and universally introduced;
- *institution and programme accreditation should be made compulsory* for each institution that pursues adult education activities on a regular basis, and this in turn will widen the option of making use of state subsidies; the quality assurance system of higher education institutions should also cover their adult education activity delivered in the form of courses;
- the systemic enhancement of *education and training information* in and outside the school system is necessary, and a wider access to these should be provided with the employment of European Union funds;
- innovation activities should be given support; for the elaboration and introduction of medium and long-term measures, research activities should be conducted and experiments need to be launched.

#### **1.2.5. Development of the legal environment**

The legal regulations laying down the conditions and the primary content of lifelong learning – the acts on public education, vocational education, higher education and the acts on employment, adult education and vocational education contribution along with their implementing decrees – have been drawn up, so there is no need for their substantial amendment. Nonetheless, legal regulations should be revised in order to determine whether they are in compliance with the changing requirements and possibilities and if they facilitate the concerted operation and development of the system of lifelong learning.

The amendment of legal regulations is of primary importance in the following fields:

- the introduction of the comprehensive transformation of the system of adult training subsidies;
- the introduction of the system of compulsory initial and in-service training of teachers working in adult education on the basis of the implementation of pilot programmes;
- the full-scale introduction of the accreditation of adult education institutions and programmes;
- making the assessment of formerly acquired knowledge, which may be requested as part of civil rights pursuant to the act on adult education, universal; making it legally recognized and accredited based on standardised professional criteria; and ensuring the appropriate continuation of the training programme.

### **1.2.6. Development of the institutional system**

*There is a need to strengthen the systemic cooperation* between the various elements (the totality of institution types providing for formal and non-formal learning and vocational education: nursery schools, primary schools, various types of secondary and higher education institutions, institutions of adult education and general education) of the institutional system of lifelong learning.

*A more economical operation of the institution system*, the enhancement of the utilization of its capacities and its strategic, longer term continuous development are *prerequisites* of a more efficient execution of both the core and the auxiliary functions.

With a view to the further extension of lifelong learning, it is necessary to grant governmental support for *supplying the regions with a sufficient number of training locations*, to provide assistance for the development of human resources and infrastructure, and the effective exploitation of the prevailing capacities.

The Government defines the development directions of each institution type as according to the following:

- *the network of secondary institutions of vocational education* should be improved on the basis of the Development Strategy for Vocational Education, and in the course of its planning and implementation the satisfaction of adult education requirements should receive special attention, particularly in respect of the regional integrated vocational training centres;
- *the public institution system of adult education* (regional training centres, employment information county advisors) should be developed so that the system will be capable of ensuring training for the disadvantaged groups at a higher level, also providing a wider range of adult education services differentiated according to the various groups;
- the transformation of *higher education institutions* into regional knowledge centres is one of the elements of higher education strategy; the cooperation and networking of higher education institutions and other institutions delivering adult education should be supported;



- for the further extension of *adult education outside the school system*, the infrastructural development of accredited adult educational institutions should be granted support within the framework of a tendering scheme. This infrastructural development should provide training of a quality similar to that of the training provided by the school/vocational school and the higher education institution network;
- *the Government shall prepare a separate programme* to motivate the enhanced involvement of the general education and cultural institution network in the process of the implementation of lifelong learning;
- the State subsidy system should give priority to *civil organisations operating in the field of lifelong learning* with special regard to those that promote the education/training of disadvantaged children, youth and adults and implement programmes with such objectives;
- the activity of Hungarian training institutions in the neighbouring countries aimed at the development of lifelong learning should be given support.

For the effective implementation of the above support facilities *the Government envisages the promotion* of the cooperation of educational and training institutions in the form of a consortium, targeted at the delivery of a wide range of advanced and high-quality training programmes and services, taking into account the regional and local requirements of the economy and the labour market.

#### **1.2.7. Development of the financing system**

The multi-channel support system of financing lifelong learning has been established, therefore there is no need for substantial modifications. However, the rules of fund utilisation should be modified and new sources need to be sought with a view to the following points. A crucial motivational and financial precondition of lifelong learning is the system of support and incentives for youth and adults intending to study, whereby the Government also seeks to encourage the individual's learning "investment". In this respect the Government intends to introduce the following measures of strategic importance:

- development and at least experimental introduction of the system of individual training accounts due as a citizen's right; this would guarantee better and more extensive support for the individual than the current option of personal income tax allowances;
- assistance in the acquisition of the first vocational qualification for adults, and the second vocational qualification for older adults (over 50 years of age);
- improvement and modification of the financial conditions of receiving funds from adult education subsidies acquired through tendering schemes;
- funding the initial and in-service training of teachers engaged in adult education;

- development of a so-called substitution system for the study term of employees, which would, first of all, promote the learning opportunities of employees of micro- and small enterprises;
- facilitation of home learning: based on the support granted for the purchase of information technology tools and the maintenance of the personal income tax allowance over several years, as well as the introduction of the support of internet subscription serving learning purposes.

## 2. THE PARADIGM OF LIFELONG LEARNING

In the past one and a half decades nearly all areas of the Hungarian society and economy have witnessed fundamental changes. These changes comply with the trends experienced by developed and emerging countries, which triggered far-reaching changes in the fields of the economy, applied technologies and the labour market as well as the social and cultural spheres. Stemming from the increasingly prominent role of knowledge, the new challenges of the turn of the millennium call for new solutions in almost all areas of education and training. Instead of individual adaptation to the education system, there is an ever-intensifying demand for an institutional system that provides assistance in learning and the dissemination of knowledge and is adapted to individual and community demands. The aim of this strategy is to outline the policy guidelines and the practical work to be performed to this end. Based on this strategy, education, training and certification systems become capable of ensuring in the long run adequate foundations and an opportunity for continuous development for all with a view to the dynamic development of their competences.

A further goal of the strategy is to ensure that Hungary fulfils the requirements set by the EU Lisbon process in connection with lifelong learning. According to this, by 2005 Hungary is expected to establish lifelong learning in the process of the so-called “open coordination” as a strategy and system interpreted and articulated from a professional point of view. The execution of this task, however, is both an opportunity and a challenge. Hungarian society and the economy of the country nowadays encounter several modernisation difficulties and possibilities to which no apt and efficient solution may be found without the systemic dissemination of lifelong learning.

The European conceptualisation of lifelong learning – interpreting the notion of knowledge and learning in broad terms – focuses on the competence development of the individual. The strategy considers theoretical knowledge and practical competences as evidently inseparable elements.

The national development of lifelong learning calls for the preparation of a strategy that is harmonised with the associated sub-fields and effectively complements the development orientations of other sectors. In this respect, as of now Hungary can boast of numerous partial results (see Figure 1), which were unambiguously engendered by the concept of lifelong learning or facilitate lifelong learning. In addition to the above, several measures of the Human Resources Development and the Regional Development Operational Programmes of the National Development Plan for years 2004–2006 explicitly point to the concept of lifelong learning. As a consequence of the above, Hungary disposes of the sub-policies and development resources serving the implementation of lifelong learning which could function as the starting point for a comprehensive strategy in the field of human resources development and the EU planning period of 2007–2013.

The strategy covers all relevant areas, addresses all potential partners, integrates the associated sub-policies into a single system, consistently builds on the sectoral and sub-sectoral development concepts formulated by the ministries and the social partners concerned, and draws on the complex document of the Centre of Education Policy Analyses (OPEK) of the National Institute of Public Education (OKI) prepared upon the request of the Ministry of Education.

**Figure 1: Strategic documents related to lifelong learning**

<b>Associated sub-policies</b>	
Public education (OM – Ministry of Education)	Medium-term Development Strategy for Public Education of the Ministry of Education
Vocational education and training (OM)	Concept of the Development Programme for Vocational Schools Long-term Development Strategy for Vocational Education and Training
Higher education (OM)	Hungarian Universitas Programme
Adult education (FMM – Ministry of Employment and Labour)	Adult Education Strategy
Education - IT (OM and IHM – Ministry of Information and Communications)	Information Technology Strategy of the Ministry of Education Information Technology Society Strategy
Creation of opportunities (OM)	Strategy for the Mitigation of Educational Inequalities Medium-term Development Programme for the Education of National and Ethnic Minorities
NDP 2004–2006 (NFH – National Development Office – and the ministries concerned)	National Development Plan (2004–2006) Human Resources Development Operational Programme (HRDOP) Regional Development Operational Programme (RDOP) Economic Competitiveness Operational Programme (ECOP)
Employment (FMM)	National Employment Action Plan (annually)
Social policy (ICsSzEM – Ministry of Youth, Social and Family Affairs)	National Action Plan for Social Cohesion
Healthcare (EüM – Ministry of Health)	National Public Health Programme
Culture (NKÖM – Ministry of National Cultural Heritage)	Cultural Strategy
Research (NKHT – National Office for Research and Technology)	Strategy Promoting Research & Development and Innovation
Financing (PM – Ministry of Finance)	Convergence Programme (2004–2008)

By implementing the proposals articulated in the strategy, Hungary may fall into line with the middle range of the member states in the European Union within the field of the implementation of lifelong learning. Simultaneously, it can join in a learning process based on professional and specialised political dialogue, which can actively assist in the strengthening of economic competitiveness and social cohesion, and the establishment of the knowledge-based society.

The strategy essentially covers the period up to 2013, in compliance with the structural planning of the European Union, nevertheless, it contains several objectives whose implementation is envisaged by 2010 in line with the EU's Lisbon Strategy.

The strategy reflects, both in terms of structure and content, an approach according to which in elaborating the development of education and training activities, one has to abandon the

sectoral approach associated with the existing institutional systems and place governmental solutions offered for complex socio-economic problems in the limelight. The programme for the development of lifelong learning can only be successful if it forms an organic part of the comprehensive programme of the development of the Hungarian society and economy. To this end, in terms of its nature the strategy does not follow the content and structural model of traditional sectoral strategies; instead, it relies on a novel approach. An overt aim of the strategy is to promote a consensus regarding the action programmes and action plans in the various sectors aimed at systematic development.

The first chapter of the strategy explores to what extent the paradigm of lifelong learning represents a new approach compared to former ways of thinking on education. The second chapter investigates the socio-economic environment forming the supply and demand sides of education and training from the perspective of an extended concept of lifelong learning, and analyses those key processes that have an impact on the quality of human resources. The third chapter contains the priorities and the overall goals of the strategy. The fourth chapter identifies development trends in the key areas falling within the scope of the policy of lifelong learning, and identifies specific areas of intervention and defines the development goals within these. The chapter provides an analysis of each key area which substantiates the necessity of intervention. Finally, the fifth chapter takes stock of the policy principles that are indispensable for the implementation of the objectives set for the areas of intervention and for the implementation of a development policy that facilitates a coherent system building.

An important element of concept formulation is that the objectives proposed in the strategy need to be reviewed and evaluated from time to time, and, if necessary, the strategy should be amended accordingly, as well as the results of the programmes and action plans developed for their achievement and the efficiency of political tools.

### ***2.1. Focus on the learning citizen and learning<sup>1</sup>***

Previous models of approaching education and the organisation of education placed the institutional system and the respective expectations in the centre of development policies. The focus of lifelong learning should be on learning and on the customisation of learning processes and the needs and abilities of the individual intending to study. Every person should be made interested in and capable of learning.

### ***2.2. From cradle to grave***

In a knowledge-based economy and society learning is one of the most important factors determining competitiveness and the quality of life. Learning is essential both from the perspective of the individual and also the society and the economy. This inevitably entails the temporal extension of learning. Lifelong learning encompasses the entire life cycle of the

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<sup>1</sup> Apart from the terms defined in the chapter, for a collection of additional definitions related to the paradigm of lifelong learning see Appendix 3 of the strategy.

individual, from early socialisation and pre-school age education to post-active age in terms of employment. The critical period of the appropriate development of abilities required for lifelong learning is the first seven to eight years. Basic social skills and the capability for individual learning develop during early childhood education and the initial period of education. The generation of adequate and complex early learning environments is essential with respect to the foundation and effectiveness of lifelong learning. The enhancement of early learning conditions is a factor that improves the opportunities of every child, since the timely recognition and the remedy of problems in most cases improves the efficiency, durability and cost-effectiveness of the intervention.

Adult learning in turn equally serves the improvement of the employability of the individual and other factors influencing the quality of life (health, culture, family, personal relations, hobby, etc.), thus the exploitation of learning opportunities remains important after the active age, too.

### ***2.3. Learning for all***

For many people, learning is a source of joy, an integral part of life. However, in many cases learning would represent a chance for the substantial improvement of the quality of life for those, who do not receive sufficient motivation for learning or suffer from learning difficulties. Thus, amongst the measures aimed at the development of the system of lifelong learning, targeted programmes combating learning disorders, alternative learning and teaching strategies that offer another chance for dropouts, and measures strengthening the relationship and the interaction between learning situations and the environment are appreciated. Differentiated support systems and protective networks should be instituted providing assistance in the various age phases, and these should be accessible and offered to all. By means of early intervention programmes the regeneration of underprivilege could be prevented. All these can contribute to the strengthening of social cohesion and the development of civil activity as well as the better use of individual capacities and the unfolding of abilities.

### ***2.4. Diverse learning objectives***

Learning is not only a tool required for finding and holding an appropriate job, but something positive in and for itself: it also permeates several other dimensions of the quality of life. We live in an artificial and dangerous environment of high technical quality, a society torn away from nature, where a healthy life conduct actually needs to be learned throughout our entire lives. Our practical competences, knowledge related to our communities and culture is in need of ongoing development and enhancement, this being a precondition of a full life. The temporal and spatial extension of learning blurs the borderline between knowledge and abilities acquired in the course of leisure and cultural activities and knowledge accumulated through school learning. This in turn grants an opportunity for drawing on the cultural and social needs of the individual to a larger extent and on those means and resources a part of which people use, even if not consciously, for the purpose of learning.

## **2.5. *Emphasis on competence development***

Personal knowledge: general, professional, social competences enable people and communities in a constantly changing world to retain their integrity amidst dynamic technological, economical and social changes while being able to adapt to the new circumstances and being capable of updating their knowledge.

Basic skills: the sum total of skills required for activities under the conditions of a contemporary society, such as writing, reading, mathematics, communication (ICT, foreign language), decision-making, the ability to participate in a work organisation, ability for individual learning, health consciousness, etc. Key competences: the totality of competences supplementing the basic skills, which enable the individual to acquire new knowledge and to adjust his/her knowledge to the new requirements, to adjust his/her knowledge and skills to the requirements of learning organisations and to contribute to evolving new forms of learning organisations, to adapt to the prospects of a changing career and to increase his/her mobility by way of lifelong learning. (The key competences identified by the EU are as follows: the ability to communicate in one's native language, mathematical skills, the ability to communicate in a foreign language, basic skills in natural sciences and technology, IT skills, the skill of learning to learn, interpersonal and civic skills, employee skills, entrepreneurial skills and a general cultural skill.)

In systems operating within relatively rigid and stable social and economic structures, not all of these belong to fields deemed important by professionals working in education. The rapid development of the education market proves that more and more strata include the gradual expansion of competences in their life plans even after the completion of institutional learning. The emergence of competence development necessitates a new, all-inclusive conceptualisation of education and training which goes beyond education levels and fields of science, its decisive motive and aim being the raising of the interest in lifelong learning and the facilitation and promotion thereof by means of institutional and market tools. At the same time, this is the token of social adaptability, the ability of renewal and innovation capacity.

## **2.6. *Schools can also build on out-of-school knowledge – formal, non-formal and informal learning***

Our everyday life is increasingly affected by changes that make learning indispensable for the individual. Under such circumstances it is especially important that learning opportunities keep pace with the increasing learning demands. The spread of this approach has called the attention to those learning forms, which are traditionally not considered to be learning situations. By formal learning we mean all training aimed at the attainment of a vocational qualification recognised by the State. (This includes the attainment of any school qualification or vocational qualification, and the passing of an accredited language exam. The attainment of a vocational qualification through training outside the school system also counts as formal learning.) In addition to an activity organised for formal learning purposes – which results in an officially recognised qualification/certificate and in most cases takes place in an education or training institution – non-formal (organised for learning purposes, but giving no recognised qualification) learning, and learning taking place in informal learning situations associated

with everyday activities, gain more and more emphasis. Learning forms within the framework of courses, workshops, distance education or organised with private teachers or individually with training purposes and which serve the supplementation, consolidation and acquisition of competences, but not the attainment of school or vocational qualification, are listed under non-formal learning. Most training at the workplace, courses including language courses, etc. organised by general education institutions and labour development and training centres, private lessons, informal places of learning and activities pursued in Roma community centres belong to the category of non-formal learning. Non-conscious learning is a form of informal learning. All areas of everyday life are convenient for the accumulation of experiences, which have the potential to shape personality. The major areas include the media, the workplace and the family.

### ***2.7. New learning culture***

People do not feel motivated to take part in a form of learning the methods of which do not take into account their differences arising from their individual capacities, life situation and history. The extension of learning opportunities should be accompanied by the observation of individual expectations and ambitions. For the appropriate foundation thereof and the creation of psychic and cognitive conditions a shift in approach is required both in public opinion and by the profession; the recognition and appreciation of the significance and particularities of early learning is necessary. It is important to recognise the fact that early development can be assisted by relying on the sources of joy residing in playful learning situations. This provides the foundations for the development of a joyful, flexible, individual and differentiating learning culture. By means of an appropriate shift in attitude and approach and proper teaching/learning methods and tools motivation can be increased and learning can become a joyous and successful activity. Contrary to traditional pedagogical methods, learning processes managed and planned on the basis of the project method, group work, peer learning and constructive evaluation become highlighted, the simulation of knowledge contents and their processing in real life situations become more valuable, and the environmental characteristics and community dimensions of learning become decisive. The role of trainers and instructors will change considerably in the new learning culture. The utilization of the efficiency of opportunities that the various learning situations entail pushes methodological development and the promotion of the application of innovative pedagogies into the forefront.

### ***2.8. Integrating the different forms and levels of learning, education and training into a single system***

In order to make learning a real and available option for the individual in any stage or moment of life and life situation, it is indispensable to interpret lifelong learning as a single system. This holistic approach requires, among others, that by structurally building on one another, the various education and training forms and levels guarantee the acquisition of skills and contents at all times, which not only make an individual capable of linear progress within the system, but also facilitate a flexible transit between the different learning forms.



### 3. THE SOCIO-ECONOMIC ENVIRONMENT OF LIFELONG LEARNING

#### 3.1. *The formation of lifelong learning: A European Union requirement, a national prospect*

The paradigm in which the European Union formulates the development of human resources is situated in the intersection of the various public policies, including the education policy, employment policy, social policy, economic policy and health policy. The conceptual framework converging the concrete sub-policies is lifelong learning.

#### **The definition of lifelong learning**

“...lifelong learning must cover learning from the pre-school age to that of post-retirement, including the entire spectrum of formal, non-formal and informal learning. Furthermore, lifelong learning must be understood as all learning activities undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective.” (Council Resolution (2002/C 163/01) on lifelong learning)

The Communication of the European Commission adopted in 2001 (Making a European Area of Lifelong Learning a Reality) explains in detail the principles of the policies that can be put into operation for “making the Europe of learning a reality”. These are as follows:<sup>2</sup>

- Focusing on the needs of the learning citizen
- Adequate resourcing
- Facilitating access to education and learning opportunities, social inclusion
- Disseminating the culture of learning within the entire population
- Striving for excellence
- Development on the basis of partnership approach together with the relevant actors

In addition to the above principles, the Commission noted that traditional institutions in themselves with their present network of relations are inadequate for the establishment of the system of lifelong learning, and the involvement of a new type of cooperation demands strategic thinking. A government document on the national strategy for lifelong learning must be prepared in 2006 consistent with the system of the so-called “open coordination”.

For Hungary this novel approach is an opportunity to transcend traditional thinking of learning and to reassess learning as an individual and social “investment”. The aforementioned approach to lifelong learning is suitable for the reconsideration of the institutional system of education, the programme structure and the structure of qualifications, and the drafting of a quality-sensitive and more cost-effective development policy that takes into account labour market and social objectives.

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<sup>2</sup> Making a European Area of Lifelong Learning a Reality. European Commission, 2001. 5. p.

## **3.2. *Challenges on a national level***

### **3.2.1. Social challenges – the dilemmas of the system environment**

As a member of the European Union, Hungary – like the other Member States – has to face the fact that if it is to remain competitive in a considerably more heterogeneous global arena than before, and that it has to become competitive without losing those social and cultural achievements – including, in particular, the solidarity between the social strata and a dual, national and European, cultural identity –, which we regard as components of the European lifestyle and quality of life.

At the beginning of the millennium ahead of us, one of the most crucial reserves for the stimulation of economic welfare and social development lies in the improvement of human resources. Education plays a decisive role in the motivation of the human potential, the mobilization of creative and constructive energies in individuals and communities. However, it can only fill this role if the aforementioned goals are in place along with the governmental and local education policies that apply the tools required for their achievement.

#### **Competitiveness or social cohesion: the dilemma of the purpose of training**

Innovative ability is a determining element in competitiveness, where research & development centres, i.e. higher education institutions effectively disseminating accumulated knowledge, are assigned a decisive role. At the same time, innovation may only become economic resources in an environment that is receptive to innovation, conditional on a social environment ready for the renewal of knowledge and local communities that can transform into “learning organisations”. The conditions of the development of an innovative environment willing to learn differ greatly within the country. Besides geographical inequalities, it is primarily communities of villages and particularly those of the Roma population that suffer from disadvantages due to the institutional selective mechanisms of the education system and the lack of an innovative training environment.

With scarce financial resources the development requirements of elite training purporting to achieve competitiveness and those of mass education, intended to fulfil the goal of social cohesion, in most cases appear as a political dilemma in Hungary today, whilst elite training designed to cater for the gifted and quality mass education that ensures participation from a broad social spectrum are actually two complementary sides of talent management, i.e. eventually those of human resources management.

For the development of lifelong learning the objectives and impact of three interest systems should be taken into consideration: the most important component of social interest is the achievement of the highest possible level of education and qualification; the interest of the economy is a sufficient labour market supply paired with the lowest investment cost; individual interest is not independent from these, but individual career ambitions may differ greatly from the above.

#### **Quantity or quality: the dilemma of cost-effectiveness**

Hungary joined the European Union with an extensively built institutional system of education that has been updated and restructured in several respects, but operating under relatively unfavourable demographic and social circumstances and deteriorating macroeconomic conditions.

The system of financing has created interest systems in the allocation of resources which make institutions and learning citizens interested in the quantitative development of education rather than the quality improvement of education and learning (e.g. normative financing on the basis of headcount, student support system irrespective of performance and return criteria, lack of measurement and assessment of quality standards).

The requirement of cost-effectiveness from the perspective of efficiency demands in the long run a development policy concentrating on the improvement of quality, in particular the striving for excellence and the enhancement of equality of opportunities, this being the objective for the support of which the European Union also provides development funds. At the same time in today's Hungary, the competition for obtaining development funds fairly often substitutes fundamental financing or is reduced to the subsistence struggle of institutions and the actors of the educational service sector. In such an environment effective governmental intervention can only be achieved by the deliberation of development goals, expenditures, outcomes and side effects, along a consistent strategy.

### **3.2.2. Macroeconomic challenges**

#### **Low level of labour market activity**

According to the evaluations of both the OECD and the EU, the evidently low level of employment of the Hungarian active-age population<sup>3</sup> is untenable. (In 2002 71% of men and 56% of women between 25-64 years of age were employed, the respective OECD averages were 81 and 62%.) This ratio is low in comparison with not only the OECD average, but also with countries of similar characteristics (the Czech Republic, Slovakia)<sup>4</sup>.

At the same time, relative to other countries the employment ratio of those not having completed primary education or having completed primary education at the most is particularly low (in an international comparison, those with ISCED 1 and 2 level education). (Only every third person aged 25-64 having completed primary school at the most is employed.) This indicates that a certain group of society is not able to acquire the key competences necessary for employability during the 11 years of compulsory education, or is excluded from the labour market due to other reasons.

With the progress of age the correlation between employment and school education is becoming stronger, presumably in the context of the ability for the renewal of knowledge. Whereas e.g. in the age group of 55-64 years the proportion of employment among men with higher education qualifications is 64%, and is only lagging 8% behind the international average, within men aged 55-64 with lower than secondary education only one in five is employed (22%) compared to the OECD average of 52%.<sup>5</sup> The difference between the OECD average and the Hungarian level of employment is most likely of a temporal nature, and is also related to early retirement common at the time of the political changeover. Nonetheless, the older age group with low-level qualifications may have been squeezed out of the labour

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<sup>3</sup> Working age: OECD publications regard those within the 15-29 age bracket as young adults and those between 25 and 64 years as working-age adults. In the first group the categories of student/non-student, employed/unemployed and their combinations are analysed, while the second group is examined in terms of the categories of employed/unemployed and economically active/inactive.

<sup>4</sup> Education at a Glance 2004. Paris, OECD. Table A10.1a

<sup>5</sup> Education at a Glance 2002. Paris, OECD. Table A11.1

market due to their multiple disadvantaged status caused by the cumulative effect of poverty, lack of school education, poor lifestyle, poor ability to assert their interest, and long-term unemployment.

### **Ageing population: problems of labour force replacement**

As a consequence of the low birth rate, the poor health condition of the population and the frequency of early deaths, the operation of public services, the social security and the pension scheme will be the task of a population that has an unfavourable composition even in European comparison. The obvious difficulties can only be moderated through the health education of children and youth and a more efficient health improvement and employment of adults and elderly persons. The traditional set of employment policy tools is seemingly not ample enough to this end.

### **Low representation of disadvantaged groups in the labour market**

One criterion of adaptation to changing economic conditions is that individuals possess marketable knowledge. Disadvantaged groups who do not have appropriate qualifications and thus cannot meet labour market requirements are in an extremely difficult situation. Their situation is worsened by the lack of an inclusive social environment and their poor state of health. The involvement of groups threatened by unemployment in lifelong learning is therefore of special significance.

Disadvantaged people particularly belong to the following social groups: the Roma, migrants, women, those with a low-level of qualification, those not having adequate qualification, early school-leavers, inhabitants of underprivileged settlements, people with changed working ability and disabled persons.

### **The potential for the renewal of human resources**

In knowledge-based societies the qualification of the labour force is a decisive factor in the country's economic potential. The EU deploys a variety of indicators for the measurement of innovative and learning abilities of the Member States. Amongst Hungary's weaknesses, the lower-than-EU-average rate of those with higher education qualifications in the active-age population, the low proportion of those with academic degrees in science and engineering, and the low rate of participation in adult education and PhD training deserve special attention<sup>6</sup>.

### **Availability of information and communication technologies**

After an ambitious start, by the turn of the 21<sup>st</sup> century Hungary dropped below the average level of the Central European accession countries in respect of the availability and use of information and communication technologies. Although as regards certain indicators (innovation potential, general use in schools, retail subscribers to broadband connection) we are still competitive with Central Europe, internet-based communication technologies have not yet become an integral part of everyday life of society. According to GfK data, 21% of the Hungarian population aged 15 or older exploit the advantages of the internet, however, Hungary is still at a disadvantage compared to other countries of the region: among the eight Central and Eastern European countries that joined the European Union this year the proportion of internet users is the lowest in the country. In Slovenia, the leading country in the

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<sup>6</sup> Education at a Glance 2004. Executive summary, OM 2004.

region, 50%, in Estonia 46%, in the Czech Republic 35%, whereas in Slovakia 33% of the adult population use the internet.

### **3.2.3. The current state of the Hungarian human resource**

As far as the condition of human resources is concerned, Hungary is lagging behind EU average in several fields in an international comparison. This is counterbalanced only to a slight extent by the fact, that in certain professions and in certain scientific fields and areas of research and development Hungarian specialists perform outstandingly. Trends prove that opening wide the gates of higher education brought no improvement in the traditionally low rate of science and engineering professionals in the population. The rate of holders of science, mathematics and engineering degrees is also low compared to countries with a population similar to Hungary, statistics project a downward trend. The increasingly apparent learning inefficiency from the perspective of the European labour market projected by numerous national education performance surveys and sociological surveys on education first shocked the public in 2001 the OECD PISA 2000 survey's findings were published. Since then the PISA 2003 survey confirmed that the rate of students who do not possess the key competences essential from the perspective of the labour market and autonomous citizenship is alarmingly high among those attending vocational schools.

#### **Level of education of the population**

The population's level of education has been improving, at least according to the indicators of school education. Within the population aged between 25 and 64, being the most important in terms of the labour market the ratio of those having completed primary school (8 grades) at best fell by 8% between 1998 and 2002 (from 37% to 29%), while the proportion of those with secondary education qualification rose by approx. the same extent (from 50 to 57%). The composition of the working-age population according to qualifications can be deemed good with respect to secondary or lower education as shown by the OECD indicators.<sup>7</sup>

The comparison is not that fortunate when it comes to those with an academic degree. The large-scale expansion of higher education is not yet reflected in the qualification structure of the population between 25 and 64 years of age, the rate of those with a college or university degree was 14% in 2002, 1% higher than in 1998 (the OECD average in this period rose from 20% to 23%). Contrary to expectations, the proportion of those with an academic degree did not rise more significantly among the primary beneficiaries of the expansion of higher education, i.e. those aged 25-34: between 1998 and 2002 it grew from 14% to 15% (as opposed to the corresponding OECD averages of 25 and 28%).<sup>8</sup>

#### **Level of education of the employed**

Within the population aged between 15 and 74 the number of the economically active population (the employed and the unemployed together) was 4.1 million in 2002, the activity rate equalling 52.9%. The number of those employed in the economically active population was 3.9 million<sup>9</sup>.

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<sup>7</sup> The proportion of those with a qualification lower than secondary education qualification is 29%, while the OECD average equals 32%, the ratio of those with secondary education qualification is 57%, whilst the OECD average is 44%. (Education at a Glance 2004. OECD, Paris. Table A3.4a)

<sup>8</sup> Education at a Glance 2004. OECD, Paris. Table A3.4b

<sup>9</sup> KSH Almanac 2002. Table 4.3

The composition of the employed in terms of school education underwent a considerable change as of the last third of the 90's. The proportion of unskilled fell from 33.2% to 23.2%. Among those employed with a vocational qualification the rate of those having completed vocational school increased by 2% (from 30.7% to 32.5%), those with a vocational secondary school qualification from 19.9 to 25.6%, and those with an academic degree from 16.1 to 18.7%. It should be highlighted that the rate of skilled labour force with secondary education (grammar school, vocational school, vocational secondary school) increased the most significantly among the employed, on the whole the proportion of skilled labour force rose from 66.7% in 1998 to 76.8% in the first half of 2003, by 10.1 percentage points.

### **Level of education of the unemployed**

Following the peak in the beginning of 1993 (over 700 thousand persons) the number of registered unemployed was around 350 thousand on an annual average in the last years of the decade and the first years of the new decade (up to the second half of 2003). The lowest number of unemployed in recent years (328 thousand, 5.8%) was recorded in October 2002. Among the registered unemployed, the number of new unemployed entrants approximated 27 thousand with regard to the average of the past three years, thus their ratio to the total number of unemployed fluctuated around 7-8% on average. Pursuant to KSH (Central Statistical Office) data, the proportion of the age group between 15-24 years within those unemployed was 20.4%. The unemployment rate of young people was 13.4%, slightly more favourable than EU average.<sup>10</sup>

The ratio of skilled labour force within the registered unemployed was 51.2% in 1998, and came close to 60% by 2002.<sup>11</sup> This unfavourable change affected both those with secondary vocational education and those holding an academic degree: the proportion of unemployed having completed vocational school or vocational secondary school reached 55% by 2002, impaired by the more than 4% share of unemployed with an academic degree.

Among the skilled unemployed the ratio of young new entrants is on the increase. On an annual average 45% of the nearly 27 thousand unemployed new entrants have a secondary vocational education qualification, whereas 8% of them hold an academic degree.

### **3.2.4. The performance and characteristics of the institutions supporting and promoting lifelong learning**

#### **The characteristics of elementary education – fundamental requirements and special needs management**

The basic skills and key competences that are necessary for lifelong learning must be acquired in the course of compulsory education. The first international survey to assess basic skills, PISA 2000 showed that 15-year-old Hungarians underachieved in the most important basic skill for individual learning (comprehensive reading) as opposed to the OECD average. It is alarming that almost one in four 15-year-old students (23%) performed below the second level of the five competence levels of the reading skill, which represents the threshold of functional writing, whilst slightly more than half of the students (52%) reached the 3<sup>rd</sup> or a higher level necessary for successful learning in secondary schools.

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<sup>10</sup> Report of the KSH 2004/8

<sup>11</sup> Having regard to the significant drop in the number of unemployed, this is natural.

PISA and other international performance surveys reinforced that the correlation between student performance and family and social background is exceptionally strong in Hungary. In other words, school reproduces, rather than compensates for, socio-cultural disadvantages that stem from social inequalities. This is exacerbated by social segregation in schools, which threatens, due to the potential of cohorts, with the regeneration of class conflicts that are typical of traditional class societies. In spite of the high teacher headcount as opposed to a decreasing number of children, public education now reproduces to a greater extent than European average a stratum that is disadvantaged at the outset, one whose education poses obstacles and is hard to resolve. The teaching and education of groups with special education requirements is not resolved despite the existence of an independent institutional system and the high quality of supporting services.

### **The characteristics of vocational education**

A fundamental criterion of the quality of formal vocational education is the matching of the vocational profile and training headcount with economic demands, and to ensure that it responds with apt flexibility to economic development. In recent years, however, the vocational structure of training has not changed in line with labour market demands. Training is delivered for a variety of occupations where holders of the corresponding qualifications become unemployed. Moreover, the headcount of vocational schools is low and fraught with a “selection of the least fit”.

Despite the intensive modernization endeavours of the past one and a half decades, Hungarian vocational education is still struggling to improve its structure and quality. This is partly due to a disproportionate geographical penetration of vocational education infrastructure, and partly to the fragmentation of the qualification system, the difficulties of the recognition of previously acquired knowledge, the lack of practical training, and the absence of technological developments needed for modern vocational education. A further problem is that institution operators and the professional supervisory system of institutions – primarily due to the restrictions of the management and financing system – have no stake in flexible adaptation to market needs.

It is particularly difficult to offer marketable vocational qualifications to those who live in underprivileged regions in terms of the labour market, and struggled through elementary education and could not develop the ability of individual learning.

### **The characteristics of higher education**

In spite of the demographic ebb, higher education has continued to expand since the early 1990s. Hungary exceeds the OECD average in issuing qualifications. Nonetheless, the ratio of those holding an academic degree in the working-age population hardly increases.<sup>12</sup> The proportion of those with an academic degree in the active-age population is 30% lower than the EU average. This is presumably due to the fact that those who already possess an academic degree attain further qualifications, while the social base of participation – owing to the demographic situation and the underachievement of elementary and secondary education – continues to shrink instead of growing.

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<sup>12</sup> In 2002, the proportion of those in the OECD countries who obtained an academic degree compared to the typical age groups is 32%. This ratio is 37% in Hungary, 15% higher than in 1996. As a result of the demographic decline in the relevant age group, in the event of maintaining the present level of higher education Hungary will soon catch up with the European average, i.e. the ratio of those holding an academic degree in the working-population will improve.

The uneven distribution of study fields in and the inflexibility of higher education is another problem, which can partly be explained by the fact that instead of a labour market prognosis, admission quotas are adjusted to short-term student needs and the characteristics of the supply side, which in the long run leads to over-education in certain areas, and to labour market shortfalls in other fields. Both the OECD and the EU has found and predicts a shortage in professionals in the fields of mathematics, natural sciences, life sciences, physical sciences, information technology and engineering sciences in particular.

The extent of the training of scholars is a key factor in improving Hungary's scientific and innovation potential. The leading countries in PhD training are typically those that attract the most foreign students, as the international trade in higher education is most prosperous where academic training awards the highest qualifications. As regards the ratio of PhD holders, Hungary (0.7%) falls within the lower third of OECD countries (the OECD average is 1.2%). The scientific potential of higher educational institutions and the associated financing must be reconsidered as soon as possible.

The consistency between secondary and post-secondary vocational education and the labour market is hard to develop because labour market forecasts can barely influence student decisions on career and further education. This is partly due to the scarcity of appropriate labour market information, and partly to the absence of a counselling network, which is accessible to all. Lastly, the "sticking to the roots" that can be traced back to the financial situation and lifestyle of the Hungarian population, should not be disregarded, as the problem can only be solved through a complex approach to regional development.

### ***The role and situation of non-formal learning***

A typical feature of "knowledge-based society" is that learning does not come to an end upon completion of school education. Further training, retraining, and self-education are concomitant with long-term employability and adaptation to the changing conditions of the individual life stages. Adult participation in the various learning forms has a decisive impact on the renewal of human resources. It is a positive development that the role of adult education became less significant in the past decade as the education of the population has substantially improved also in terms of the social base of participation. However, in an international comparison the rate of participation in adult education is not satisfactory, and the shortcomings of the statistical measuring systems also pose a host of problems considering that insufficient data supply has no consequences.

As with participation in formal education and vocational education in the school system, the concept of lifelong learning incorporates non-formal learning. Non-formal learning does not exclude formal learning but in certain cases complements it. (E.g. the education of the disadvantaged with a view to creating equal opportunities may be facilitated outside the school system by what is called the method of "tanoda" – an informal scene of learning – and by the Roma community centres.)

Non-formal learning is deeply rooted in Hungary. The country has an extensive network of general education institutions (community centres, art schools, general education centres), public libraries and playhouses. Organisations affiliated to the Hungarian People's Academy Association, the network of so-called telecottages (community distance service centres) currently under construction, school and other internet networks, and the numerous organisations engaged in adult education (e.g. regional retraining centres, language schools and other private service providers involved in adult education, etc.) provide a solid basis for



training and education institutions. Partly operating on a market basis, this sector of non-formal learning draws on generous public funds (adult education subsidy, Vocational Training Fund, etc.) besides its revenues from private sources.

According to two EU indicators (the ratio of training expenditures of companies to total labour costs, and the actual participation of the active-age – 25-64 years – population in training), participation in non-formal and informal learning is apparently meagre in Hungary: as regards the company budget, Hungarian companies allocate 1.2% of their labour costs to the training of their employees as opposed to the (old) EU average of 2.3%. Out of 100 active-age (25-64 years) persons five attend some form of training, whereas the corresponding EU average is 9% (2004).<sup>13</sup> The reasons of low participation – as has been demonstrated by other surveys – include the lack of basic competences required for lifelong learning, the scarcity of disposable income for adult education services and of supply-targeting strata in the direct need. This area – like other spheres of learning – has also accumulated various socio-economic and cultural advantages and disadvantages.

### **Informal learning**

Lifelong learning also embraces informal learning, which may be uncoordinated and non-conscious from the individual's perspective. Therefore, the community values that are important to the country and society must be protected and sustained. The major areas that have a direct culture and personality shaping potential are: the media, the workplace, cohort groups and the family. We are responsible for the experiences the citizens acquire and the way they can process these for their own and the public's benefit. Indicators of active citizenship (e.g. rate of participation in elections, indicators of confidence in public institutions, corruption indicators), and indicators of education and welfare (average minute ratings of TV programmes, rate of divorces, frequency of death causes related to alcoholism, low birth rates) paint a surprisingly accurate picture for the experienced reader about how essential informal learning is. The processes we can observe indicate that the validity of education and civilization should be interpreted in a broader context, and that the strategy for lifelong learning can only be translated into productive action plans if we have a positive social vision of the future based on public consensus.

### **Management of education and training in and outside the school system**

The high-level management of training delivered in and outside the school system is split into two, which makes it more difficult to establish coherence. The institution system is extremely fragmented, especially in the case of the school system at the level of municipal management, and in adult education at the level of training institutions. There is practically no cooperation and division of labour between the institutions or if any, it is along fragmented institutional interests.

Institutional interests – or in the case of education and training delivered in the school system, the municipal management system – essentially do not support the adaptation to the labour market, and the legal and funding systems do not sufficiently promote modernization and the facilitation of social and economic cohesion.

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<sup>13</sup> These data also include those attending education in the school system. In Hungary, those attending education in the school system make up for half of the 6%.

### 3.3. SWOT analysis

Figure 2 presents the SWOT analysis, i.e. the strengths and weaknesses associated to the system of lifelong learning and the opportunities and threats posed by the external environment.

*Figure 2: SWOT analysis of lifelong learning*

STRENGTHS	WEAKNESSES
<p>Consensus among political decision-makers and professional leaders on the need for a strategy</p> <p>Wide publicity of the EU's strategy for lifelong learning among experts and decision-makers</p> <p>Sub-sectoral sub-strategies and legal regulations related to their implementation, and an operating institutional network</p> <p>Considerable non-state sources for training subsidies</p> <p>Training levels and paths that are relatively open to each other</p> <p>Individual innovative capacity of formal education and training systems</p> <p>A developed institutional system of the labour-market, a high standard of active measures</p> <p>A continuous increase in the number of participants in secondary and tertiary education</p> <p>Improving qualification level of the population</p> <p>Growth of education and training expenditure relative to GDP</p> <p>Institutional frameworks in place for the cooperation between the partners concerned</p> <p>Wide market of adult education supply</p>	<p>Absence of a legitimate and coherent institutional system designed to monitor the strategy for lifelong learning and its implementation and the lack of stability of legal and financial backgrounds</p> <p>An insufficient level of basic skills, labour-market skills and social competences of the Hungarian human resources</p> <p>A low headcount of participants in adult education compared to the EU, under-representation of people with low qualification, the elderly and the inactive</p> <p>Poor participation of the formal education and training systems in lifelong learning with special regard to adult education and the development of key competences</p> <p>A low participation rate in higher education in the field of natural sciences, engineering, PhD and doctoral training (ISCED 6)</p> <p>A considerable number of school dropouts (especially in specialized secondary schools)</p> <p>Weak institutional cooperation between the formal education system and the labour market:</p> <ul style="list-style-type: none"> <li>- the content of training does not match economic requirements</li> <li>- the vocational composition of school-leavers does not meet labour-market expectations</li> <li>- weakness of career guidance and counselling</li> <li>- the lower-than-EU-average ratio of people with an academic degree in the active-age population</li> </ul> <p>Insufficiency of cooperation between the</p>

	<p>actors concerned at a regional level</p> <p>Inadequate standard of human and infrastructure conditions needed for the wide-scale dissemination of a modern learning culture</p> <p>Absence of a modern, nationwide measurement, assessment and career monitoring system</p> <p>The relatively low participation rate of the business sphere and the individuals in financing the costs of lifelong learning</p>
<b>OPPORTUNITIES</b>	<b>THREATS</b>
<p>Growing public and private sources for human resources development</p> <p>The spread of knowledge-intensive sectors in the economy</p> <p>Measures to disseminate more flexible forms of employment</p> <p>Expanding learning forms due to technological development (e-learning, ICT)</p> <p>Partly as a result of EU membership, an increase in the interest of the population towards learning and the acquisition of marketable knowledge</p> <p>The EU's long-term policy commitment to the strategy for lifelong learning, the implementation of national policies for lifelong learning is expected to be funded from growing Community sources</p> <p>Strengthening international cooperation will facilitate familiarisation with best practices</p>	<p>A significant restructuring in the number of students and the active-age population as a result of demographic processes</p> <p>A process of falling behind and exclusion of social groups suffering difficulties</p> <p>International competitiveness of Hungary will weaken owing to a further deterioration of the quality of human resources</p> <p>Society's willingness to invest in learning will decrease</p> <p>The worsening internal cohesion and economic dynamism of the EU will weaken its commitment to the policy of lifelong learning and its promotion</p> <p>A widening digital gap</p>

## **4. PRIORITIES OF THE STRATEGY FOR LIFELONG LEARNING**

Having regard to the universally accepted components of the European paradigm of lifelong learning, and the opportunities – primarily offered by the capacities of the national education and training systems – and the desired development trends of Hungary, the specific steps to be taken for a practical implementation of Hungary’s lifelong learning strategy are best defined as five priorities:

- Strengthening the role of education and training in creating opportunities
- Strengthening the ties between education, training and the economy
- Application of new governing methods, public policy procedures
- Enhancing the efficiency of education and training, increasing their total social expenditure
- Improving the quality of education and training

The priorities are directly linked to the programme of creating a competitive, fair and safe Hungary drafted for the period of 2007-2013, and to all comprehensive objectives of the programme (see Appendix 1). In the global arena of competition characteristic of Hungary’s international economical and political environment and under the conditions of the creation of the knowledge-based society, these are the priorities that constitute the human pillars of achieving the comprehensive goals.

### ***4.1. Priority 1: Strengthening the role of education and training in creating opportunities***

In order to mitigate social and geographical disparities, it is essential to strengthen the role of education and training systems in and their contribution to combating social exclusion and improving the individual’s life opportunities. To this end, any group that is disadvantaged for social or other reasons should receive marked educational support. Geographical disparities in the quality and accessibility of education and training systems should be decreased to a considerable extent by relying on the extensive application of technologies (ICT) that ensure the expansion of learning opportunities, to take a single example.

### ***4.2. Priority 2: Strengthening the ties between education, training and the economy***

It is indispensable that the links between education, training and the economy are further forged in order to allow education and training systems to respond more rapidly and flexibly to labour-market impulses. This necessitates, on the one hand, the full-scale establishment of the institutional framework of cooperation between formal, non-formal education and training systems and employment services at national, regional and local levels, and the systematic

connection of the monitoring systems watching over the basic processes of education, training and employment policy. On the other hand, the recognition and validation of knowledge and skills acquired through non-formal learning must be ensured.

#### ***4.3. Priority 3: Application of new governing methods, public policy procedures***

With a view to create the conditions for lifelong learning, it is vital to eliminate the traditional partition walls between the various forms of learning as well as the different levels of education and training, and to make learning attractive. As regards the process of lifelong learning, building on a higher level of institutionalisation of the partnership between the political decision-makers concerned and the major social and economic actors, efforts should be made to create a new mentality in respect of governing, and also the development and methods of public policy. For the sake of the efficiency and sustainability of development, the civil sphere involved in strategic planning must be assigned a more influential role. Instead of the overregulation of the system, there is a need for a more intensive application of “soft” administration tools (e.g. the open coordination method urged by the EU). Best European practices in this field should be considered to a greater extent. We must encourage the enhancement of the reflexivity of the actors involved, both in respect of external economic and labour-market impacts and internal student requirements.

#### ***4.4. Priority 4: Enhancing the efficiency of education and training, increasing their total social expenditure***

The improvement of the quality of human resources is unimaginable without the continuous increase in the total social expenditure spent on education and training. We should achieve that in addition to the State, enterprises and individuals intent on learning spend higher amounts on the acquisition and continuous renewal of knowledge and competences. On the other hand, – taking into account the demographic and internal migration trends – the economic efficiency of the operation of education and training systems need substantial improvement. For the sake of better efficiency and sustainability, it is expedient to focus developments on the support of processes already in progress and system building (knowledge background, information management, measurement-assessment, monitoring systems).

#### ***4.5. Priority 5: Improving the quality of education and training***

The augmentation of the competitiveness of the Hungarian economy is unimaginable without the continuous improvement of the quality of human resources. This requires efficient, system-oriented measures for all forms and levels of the education and training systems which, by means of relying on a widespread use of state-of-the-art technological

achievements, significantly improve the physical infrastructure of the education and training systems on the one hand, and on the other hand emphasise the development of skills and competences in an innovative manner and enable the continuous measurement and assessment of the performance of the systems on the basis of uniform quality assurance. Marked attention should be paid to the training and further training of highly qualified labour, which is necessary for the wide-scale establishment of innovative and knowledge-intensive sectors.

## **5. THE APPROACH TO LIFELONG LEARNING AND ITS KEY AREAS**

The development policy targeting lifelong learning obviously requires long-term strategic thinking (e.g. the results of the improvement of initial training will be felt within 15-20 years at the earliest). At the same time, the strategy should also facilitate the resolving of acute labour-market problems. In identifying the key areas and taking account of the challenges, this chapter seeks to uphold this dual perspective. At the same time, priority areas of intervention and goals include programme initiatives that are already in the implementation phase or that have been already considered in the course of planning and which will presumably have a favourable impact on the nationwide implementation of the lifelong learning programme in the long run. The correspondence of the key areas to the strategic priorities is indicated by the brackets following the names of the specific areas.

### ***5.1. Development of basic skills and key competences in public education (Priority 5)***

The emergence of competence development is of crucial importance in both the economy and society, and hence in education. On top of traditional subject knowledge, skills and abilities which, spanning beyond a certain field, subject or occupation, are essential for learning and work and in almost all areas of life, have become more significant. All this presupposes the foundation of a new learning culture, with the acquisition of learning and communication skills and the finding of optimal methods of knowledge utilisation at its core.

Of course the building of the national system of lifelong learning starts with the reinforcement of learning bases. A learning base means (a) the knowledge, skills and abilities every person is obliged to demonstrate, and (b) the positive motivation in respect of learning. National and international surveys warn of serious problems in respect of both components.

In a European comparison, playful skills development in nursery schools is currently of an adequate standard, whereas in upper primary school student performance is lagging behind the average of the other states. In 2001, the IEA's (International Association for the Evaluation of Educational Achievement) "PIRLS" survey demonstrated that among fourth graders (i.e. 9-10 year olds), Hungarian students ranked 8th. The PISA 2000 OECD survey (among 15-year olds) showed poorer Hungarian student achievements than the average of the countries involved in the survey.

It is of great concern that in the domestic school system the development and deepening of the basic skills does not receive adequate attention and thoroughness during the first four years of primary school, and that school catch-up classes do not provide sufficient assistance, particularly to multiply disadvantaged groups. The majority of upper grade students cannot cope with the requirements. Their deficit – a consequence of their underdeveloped abilities and the conservative pedagogical methods – keeps increasing over the years, and their

struggling makes their learning spirit decline. In sum, they perceive school as a neutral, if not hostile, institution.

Several measures of the National Development Plan (HRDOP and RDOP) are targeted at the strengthening of learning bases, and thus the dissemination of competence-based teaching methods in public education, the integration of the disadvantaged, and the development of the infrastructure of nursery schools. In the foregoing we shall outline three areas of policy intervention without which the secure bases of lifelong learning cannot be laid down. The following action trends identify clear and accountable public policy requirements. (The main elements of teacher policy necessary for the reinforcement of learning bases are contained in Chapter 5.7.)

## ► AREAS OF INTERVENTION:

### **Improving the standard of school preparation based on personality development**

Early socialisation plays a crucial role in lifelong learning. A part of the pedagogical tools and methods based on playful personality development and positive evaluative feedback is effectively deployed in the standard form in nursery schools and the lower grades of primary school. It appears necessary to reconsider the professional work carried out in these grades and to disseminate the well-tried pedagogical and methodological elements.

In order to help children unfold their abilities and undergo successful socialisation, families must provide assistance of a complex and integrative approach from as early as birth. Direct school preparation and the primary school must build upon the work and achievements of the institutions and services of the early learning phase. The latter should select its methods so that it develops a positive self-image in every child, maintains the learning spirit, and develops the ability for individual learning, cooperation and communication skills and self-knowledge.

Education founded on personality development thus starts the development of self-knowledge, self-evaluation, problem-solving skills and communication skills, which are fundamental elements of socialisation already in a relatively early life phase.

### **Stressing key competences**

Reading, writing and numeric skills are determinant basic skills with regard to the entire learning process. There is a need for the introduction of complex teaching methods that develop diverse problem-solving skills in students by means of reading as a tool. Besides literary texts, colloquial and technical texts and publications that enhance language skills should also be represented. The teaching of special subjects must lay an emphasis on the improvement of the ability to learn from textbooks and other sources of written text (e.g. Internet).

The efficient development of basic mathematical skills is decisive in rational thinking, the interpretation of statistical information suffusing our lives and the addressing of everyday problems that can be translated into mathematical terms. Basic numeric skills are needed to maintain openness towards the technical fields of natural sciences, and to stimulate an interest in orientation towards such careers. The organisation of curricula and the objectives and tasks of teaching should therefore be governed by the mathematics of everyday life in primary education.



The sustainability of our technical civilisation and natural environment depends mainly on the extent to which people can comprehend the instantaneous and possible future consequences of the interaction of technology and nature, the degree of their conscious approach to environmental problems as consumers and citizens, and the extent to which they are capable of using the tools of technical civilisation in an environmentally friendly manner. Therefore, the improvement of basic education in natural sciences and technology necessary for all must be approached from a practical perspective and should be taught by building upon students' experiences.

It is important that the development of basic skills continues throughout school education, and that there should be a way as a final recourse to develop and further improve absent key competences also in adulthood. We should emphasise, however, that in terms of cost-effectiveness and for both the individual and the community, the additional development of basic skills in adulthood considerably falls behind the timely (i.e. childhood) development of basic skills.

***The transformation of secondary education with a view to competence development: the competence-based secondary school final examinations***

The maintenance of an appropriate inner motivation of students is vital during the whole term of school education; a crucial stage of augmenting the learning spirit is the closing phase of secondary school. The development and maintenance of learning motivations is seriously hindered today by the knowledge-centeredness of curriculum supply and the negligible ratio of elements designed to measure competences in the secondary school leaving (entrance) examination.<sup>14</sup>

International experiences show that the active participation of students in the organisation of the learning process and their stronger ties to the world outside school during the last years of secondary school have a positive effect on motivation. The diversification subjects offered, the development of an adequate training supply, the drafting of modern work forms and validation methods can result in the evolution of a learning culture we encounter today in education and training institutions that are open to new solutions.

***5.2. The key to adaptation: diverse and abundant supply in vocational education, higher education and adult learning (Priorities 1 and 2)***

At present, the relationship between the world of work and training systems is not close enough in Hungary. The output and quality of vocational education and tertiary education is not in line with labour-market demand. Ever since the turn of the millennium, national and multinational companies have been facing a severe shortage in the market of highly qualified skilled workers. It is a particular problem that methods for skills and competence development are absent from vocational and adult education and training, and that there is a lack of practice- and vocation-oriented training. Specialized secondary schools have a high dropout rate, and those who complete specialized secondary school struggle with difficulties

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<sup>14</sup> Although in the field of the latter, the reform of the secondary school leaving examination will bring about promising changes.

in attaining a secondary school leaving certificate. Employee groups, which do not have a closed system of specialised further training and are not threatened by unemployment, still do not receive adequate vocational training and further training. For the training system to actually satisfy current labour-market requirements, it is absolutely necessary that institutions organising adult and further training forge stronger connections with employers and other actors of the economy.

## ► AREAS OF INTERVENTION:

### **Modernization and streamlining of the institutional network of training**

A problem of vocational education that demands an urgent solution is how the currently fragmented, over-articulated school and institutional system – which is tailored to training formerly delivered in large companies and is difficult to finance and operate – can adequately satisfy labour-market needs. In order to tackle this problem, it is necessary to establish modern and efficient institutions of education and training accomplishing multiple goals and functions and equally ensuring youth vocational education and adult training, while being capable of following labour-market changes and of adapting thereto. Career orientation workshops and central training locations ensuring the acquisition of expensive technologies need to be set up in the framework of the Regional Integrated Vocational Training Centres (RIVTCs). RIVTCs should not replace the existing network of vocational training institutions: they rather play a complementary role. Education institutions operating in the region concerned must be involved in the restructuring process.

Currently, there are nine regional labour development and training centres operating in the country, primarily engaged in adult education, rehabilitation training, career guidance and practical training. As a result of the extended and restructured supply in the training market, it has become needful to rethink the role and function of regional labour development and training centres.

Regional labour development and training centres and RIVTCs are only efficient if a list of competences and the system of superimposed training modules are created for each occupation, since adult education may only become flexible if former studies, qualifications and skills of learners and prospective employees are considered and thus double or parallel training is avoided. They should be capable of preparing for employment the most suitable employee selected on the basis of input measurements within the shortest time possible.

### **Establishment of higher education-based regional knowledge centres**

As has been highlighted and promoted by the new bill on higher education, higher education institutions are to provide wide-scale and diversified services for the region concerned in the coming years.

Regional services can be provided through manifold cooperation between local actors. This cooperation especially concerns local governments, employers and other education institutions as well as research and development centres and bases. The development of new forms of cooperation, the creation of the necessary infrastructure and the drafting of programmes are granted support under the National Development Plan.

The specific regions are in the need of the establishment and development of community spaces (regional resource centres) facilitating learning that is available to all and ensures accessibility as well as practice-oriented instruction, education and training spaces.

### **The successful implementation of the Bologna Process in higher education institutions**

The initial cycle of higher education must supply relevant training in terms of labour-market demand. At the same time, it should ensure an adequate basis for the continuation of training in the second cycle. The setting up of superimposed training levels in the higher education system (the so-called Bologna Process) should deserve marked attention. The transformation of closed college and university majors that conclude with an academic degree but are not interrelated could mean a revolutionary step in Hungarian higher education, if it is implemented with the cooperation of business organisations and with a view to labour-market demands. International experiences ought to receive special attention in the course of establishing the new majors and the structure of superimposition.

### **Development of the school-type adult higher education**

The master's programmes to be worked out in the framework of the Bologna Process constitute an integral part also of school-type adult education. The programmes will be devised and implemented with the cooperation of employers and business organisations, using those pedagogical methods that are necessary in adult education. This is particularly relevant when the programmes are attended in parallel with work and at an older age.

Two peculiar areas of adult higher education that assume an ever-increasing significance are specialized further training and post-secondary vocational education. In both cases the practice orientation of the programmes and of their implementation is in the need of enhancement.

## **5.3. *Ever-expanding learning opportunities (Priorities 1 and 4)***

The exploitation of information and communication technologies plays a prominent role in the expansion of learning opportunities. As regards the spreading of ICT in public education, higher education and vocational education, the past decade witnessed several tremendous efforts. A major part of these efforts focused on the input side: chiefly it is the development of technology, infrastructure, access, and, more recently, applicable digital contents that are put on the agenda. Meanwhile, the output side of development is in a stronger than ever need of attention with a view to the success of "digital literacy" stipulated as a minimum requirement of employability.

In-house training serves as one possible site of expanding learning opportunities. In Hungary, however, not only the qualification level of the generations who are already employed in the labour market but also their learning ability and motivation are usually rather poor. The major part of employees did not participate in any formal, presently recognised learning. The part of the training allocation of the Labour Market Fund (LMF) companies eligible to retain is meant to promote the training and further training of employees

However, little information is available concerning its adequacy and efficiency.

The problem is aggravated by the fact that an educational gap emerged between the younger and older generations. Since a part of domestic employees work in small and medium-sized enterprises (SMEs) that are insensitive to continued training or in the black or grey economy, the qualification of the adult age groups underwent considerable deterioration during the past decade. Meanwhile, SMEs, which require continuous adaptation and flexibility, and the grey economy proved to be ideal scenes of informal learning.

Nonetheless, the training of the employees of small enterprises is problematic for two reasons. Firstly, in many cases their expertise is so special that hardly any or no appropriate trainer can be found for their further training in traditional settings. Such knowledge, therefore, cannot usually be developed within the formal framework, that is e-learning, and the role of information available on the Internet plays a crucial role. To this end, however, general skills and IT knowledge are required, which in turn – and this is the other facet of the problem – are difficult to acquire as small enterprises cannot afford to lose the time their employees would devote to training. Thus the flexibility of training forms is of substantial importance.

In addition to non-formal settings, it would be important to enhance the role of informal learning. In Hungary, individual learning outside the school system, that is informal learning and knowledge acquisition, is of negligible trade value in the labour market and is therefore generally undervalued. In many cases people themselves do not recognise the accumulation of their knowledge and skills and the opportunities that thereby present themselves. Informal settings can boast of an enormous learning reserve, and could be important innovation sources for teaching and learning methods.

## ► AREAS OF INTERVENTION:

### **5.3.1. Making the use of information and communication technologies a basic requirement**

We should achieve the “socialisation” of the use of information and communication technologies: it is necessary to specify such school organisation and education management requirements whose fulfilment inescapably involves the circle of students, parents and the partners of the school in informal learning.

In an economic environment characterised by rapid technological changes never experienced before we need to continue the wide-scale development and dissemination of information and communication technologies at all levels and in all forms of education. Small municipalities and sparsely inhabited regions should receive marked attention. It is unavoidable to develop the IT content of education and to further enhance the IT knowledge of educators. The quality of public education, vocational education and higher education institutions can be improved by the introduction of a comprehensive and standard organisational culture of measurement and assessment, which effectively operates the tools of quality development.

The measures of the Human Resources Operational Programme of the National Development Plan have made headway in the field of the establishment of information and communication technologies (ICT). The preparation of digital text books, the drafting of didactic recommendations, the dissemination of good practices, teacher in-service training, and the equipment of RIVTCs with state-of-the-art technology result in the augmentation of “digital literacy” on both the student and parent, as well as the teacher side of vocational education

institutions. This could mitigate our shortfall relative to the average of the new EU Member States.

### **5.3.2. The future of in-house learning**

Foreign experiences confirm that in-house learning has a favourable impact on the life of the company: it develops company loyalty among the employees, improves the skills and boosts the confidence of the company community; it enhances the efficiency of production. During the past decade the rate of investments increased in Hungary, and consequently, a variety of joint companies were set up. These investments generally entail the emergence of demands for new vocational qualifications and the corresponding education.

In respect of in-house learning, two major tasks are to be discharged. On the one hand, the propagation of the formal (further training) dimension of in-company learning is on the agenda in Hungary. On the other hand, it is expedient to launch the promotion of non-formal and informal learning associated with the dissemination of “learning organisation” (see below), which is facilitated by the Adult Education Act. This offers an opportunity for training to consider the various needs and requirements of the diverse types of employers (from multinational companies to SMEs) in different ways. Although the vocational and examination requirements of vocational qualifications are identical in training delivered inside or outside the school system, the reinforcement of conformity between the training programmes and the operation of examination centres call for a uniform measurement and assessment system.

The mass of employees working for small and medium-sized enterprises should be enabled to embrace the opportunity of further training. In the course of this the following strategic aspects should be observed:

- The intensive development of RIVTCs and in-company training should not be implemented at the expense of the existing vocational education system. The two should complement each other.
- Training must be brought near disadvantaged groups, and their demand for training should be increased. To this end, public education resources liberated as a result of the demographic decline may be deployed.
- In-company learning must incorporate non-formal and informal elements, preferably by allowing for future recognition in independent examination centres.
- The establishment of shared responsibility is needed among the key actors in order to realise mutual benefits.

It is expedient to further develop the project-based support scheme in the framework of which small and medium-sized enterprises are eligible for support for employee training. The Adult Education Act as amended also seems promising. It allocates support for in-company training as part of “learning workplaces” becoming eligible for support.

#### ***Creation of learning and development partnerships by the inclusion of social partners in order to further improve and boost the efficiency of the entire further training system***

The efficiency and modernity of the existing training and further training systems are widely different: in addition to the supply of teacher in-service training available to all institutions,

there is a set of “systems” constituted of a series of further training activities “performed” in the form of ad-hoc theoretical lectures. Under such conditions a learning network can be established where work is carried out with a view to the further development and boosting of the efficiency of operating systems of continued training. Under Measures 2.1 and 3.1 of HRDOP several networks of this type are being set up.

### **Introduction of a national prize and financial incentives on the basis of Western European models for employers supporting in-company training**

The creation of a national prize system honouring in-company training could constitute an additional incentive. At present, there are several such prizes for in-company learning in Hungary (officially in connection with HR), thus the task of the State could be the integration and propagation of operating initiatives.

### **5.3.3. The prospects of informal learning, alternative learning forms**

Home learning can contribute to the success of competence-oriented learning to a considerable extent. Its significance in modern society increases proportionally with the amount of free time, since this form of learning could practically encompass all leisure activities with or without the intentional purpose of learning, but nevertheless with a learning output and knowledge acquisition. Thus, it is important to raise awareness of this phenomenon at the level of the individual and thereby to stimulate motivation. School can contribute a great deal to this process by career management, the organisation of the individual learning activity and by conceiving projects for this purpose. Awareness-raising, on the other hand, could assist the individual with a more reasonable scheduling, and the sound regrouping of his/her financial resources.<sup>15</sup>

The media has the potential to play a crucial role in the development of the culture of home learning and the acquisition of individual learning techniques. The media could act as a catalyst in learning by offering new ways of communication and operating as an open learning forum for consumers [e.g. *Mindentudás Egyeteme* (The University of Global Knowledge) – a television programme where an expert/scientist of the given scientific field delivers a lecture on a subject usually of topical interest]. Furthermore, the media are an important source of information: the media could become an open scene which supplies material for the acquisition of general education and for distance education. In this context, it is important that media planning cooperates with the actors of education policy and the education institutions.

### **Alternative learning opportunities**

Besides the recognition of non-traditional learning forms it is necessary to spread active, alternative learning forms, too. We are referring to alternative adult education solutions such as the rapid expansion of community learning (e.g. based on the model of community learning, the *parent-school initiative*, or *agrarian schools* which play a decisive role in the adult education of small municipalities) primarily for the social and/or labour-market integration of disadvantaged adults who live concentrated in a certain area, or for the better exploitation of the common knowledge potential of highly-qualified adults and/or the improvement of their quality of life. Voluntary work, which is traditional in English speaking

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<sup>15</sup> See the survey of Cedefop, according to which there are three major factors determining the reasonable organisation of learning: time, money and learning ability. Pursuant to the survey, non-learning is mainly due to other reasons than lack of time.

countries, has not yet been established in Hungary. Non-profit organisations, local communities and the churches could assume a vital role mainly in the development of basic skills (reading, writing), if they were granted an opportunity to work with the local population.

These alternative learning techniques are well-established and appreciated in some of the leading countries in the global education sector. Hungary has no means to repeat this long innovation phase. The solution seems to be the “importation” of successful practices and projects implemented in international cooperation. The first point of connection of alternative community learning projects could be the programme targeted at the eradication of Roma ghettos, whose financial preparation started in 2004.

Connection to forms of non-formal learning that are currently in the state of evolution is also important. Such forms include the locally accepted and well-tried practical forms of local and currently evolving micro-regional and regional training courses (self-knowledge, language, and computer science, basic skills of folk crafts and ensuring special competences required for the ability for self-employment, organised by general education institutions, libraries, and civil organisations).

Besides expanding learning opportunities, it is important to provide for the superposition and interrelatedness of training contents and units throughout the entire lifespan. This requires the creation of an appropriate legal background and an inclusive socio-economic environment.

### **The development of distance education**

The development of distance education provides an opportunity for knowledge acquisition to take place relatively independently of the traditional limits of time and space. The individual processing of the curriculum is facilitated by a specially designed – tailored to the needs of the target group – learning package, and a support system (tutorial work, technical assistance, etc.) and infrastructure (resource centres, consultation centres, practical training locations, IT networks, etc.) assisting the learning process. The enhancement of the efficiency of distance education programmes necessitates the development of the special learning packages and the organisation of training courses for specialists who facilitate the student’s learning.

It is highly important to increase the number of distance education programmes in the field of initial training, and to grant assistance for the setting up of student support schemes for the forms of distance education. The new bill on adult education encourages distance education methods to be applied on an everyday basis in higher education institutions. An instance of good practice is that a variety of higher education institutions – with Government approval – established associations for the purpose of developing distance education. In some higher education institutions, distance education by now has a long tradition, and it is also a key component of education activity.

The support granted for development related to distance education is currently implemented with the cooperation of the Apertus Public Foundation. As regards the relevance of distance education, we can observe the softening of formerly extreme opinions, and its confrontation with traditional education gradually comes to an end. A number of institutions and teachers employ distance education elements also in the framework of traditional education. The quality improvement of distance education is also fostered by the fact that distance education programmes may only be launched in the initial training phase subject to the accreditation of

the Hungarian Accreditation Board (MAB). However, distance education does not benefit several sectors, such as manual sectors.

#### *5.4. Career guidance, advice and monitoring (Priority 2)*

In European comparison, the fragmentation and selectivity of the national education and vocational education system and the lack of **transferability** give rise to serious problems. The capacity of planning educational paths and the establishment of career guidance would require several actions both from the individual and the Government, as the necessary conditions are incomplete.

The fundamental pillars of the development and planning of individual learning paths are as follows:

- Ensuring school system-like preconditions
- Exchangeability of learning achievements to labour-market advantages
- Recognition and validation of knowledge, skills and abilities acquired through education and training delivered in the company or outside the school system (formal, informal, non-formal settings) for future studies. This condition may only be fulfilled if we define which competences and to what level certain vocational or general training develop if vocational training curricula are superimposed in a modular structure and the modules are validated.
- A reliable and constant information and counselling system which assists with the planning of the learning path and the career and by means of which specialists, teachers, instructors are able to provide assistance to students.

At the moment none of these conditions are fulfilled in Hungary in a way so that youths entering the education system could plan their learning paths. Even outside the formal education system there are no information and services available which are necessary for making conscious decisions on career building and career orientation. Modular and competence-based training has already been established in vocational education institutions in respect of certain vocational qualifications, and students are being prepared for labour-market challenges subject to institution management and operator intentions. The measures of HRDOP include the modernization of the National Qualifications Register (NQR), the extension of modular and competence-based training to the entirety of vocational education either taking place inside or outside the school system and the content renewal and development of the institutions of the National Employment Service.

The basis of a successful career orientation activity is that education and vocational education institutions have adequate information on the labour market and the actual demand-supply relations. As a result of the development efforts of vocational education of the past ten years, some relationship has been established between vocational training institutions and employers. However, not each of the two parties is satisfied with the current situation. Another important factor of successful career guidance is the corresponding training of educators.



## ▶ AREAS OF INTERVENTION:

### **Career guidance in public education**

General knowledge and competences, which are also essential in terms of career guidance, learning the areas of application of knowledge accumulated, familiarisation with the world of work, learning to learn, creativity, making judgements, ability to make decisions, self-knowledge, self-management, career correction and the development of communication skills are accorded priority in the school system. The development of vocational aptitude and skills necessary for the performance of work as well as the acquisition of labour-market knowledge and job-seeking techniques should rest on these. In the field of public education, there is a need for the development and harmonisation of the above skills with the areas of general education specified in the National Core Curriculum (NCC), as well as for the development of labour-market knowledge, job-seeking techniques and the ability to make decisions.

In addition, it is indispensable to continue the development, expansion and uniformization of the career guidance information system in such a way that it ensures for all students accessibility and the harmonisation of the career guidance activity pursued in the school system with labour-market counselling.

As regards teacher in-service training, special attention should be directed to career guidance activities. Due to the pressure of an early career selection, this preparation has exceptional significance for all teachers working at different levels in public education. In the framework of the Development Programme for Vocational Schools (DPVS) a separate project is devoted to the development of career guidance.

### **The establishment of a nationwide information and counselling system implemented at regional and micro-regional bases, operating in the form of a network**

Drawing on the available experiences, it is necessary to establish a nationwide information and counselling system, implemented at regional and micro-regional bases, operating in the form of a network for the career planning of and supplying labour-market information to students learning in primary schools, grammar schools, vocational education institutions and higher education institutions. With the help of this system one can make well-founded decisions as to with what qualification and in what occupation one has better prospects for employment in a given moment on the one hand, and as to what learning strategy should be used to accomplish future goals, on the other hand. The counselling network plays an important role in informing and regularly liaising with parents and the family and in developing the parents' strategy for further training, employment and mobility if necessary. Thus the counselling system does not only motivate youths, but also the older generation for further training in order to facilitate an active participation in the labour market. The counselling network should closely cooperate with labour centres, vocational training and adult education centres, enterprises, education and higher education institutions, operators, local governments and obviously with employers. For the sake of counselling, job portfolios (qualification, competences, demand, salary), the so-called FIT dossiers need to be completely updated and constantly maintained.

### **Measuring the success of school leavers in the labour market and feedback of results to the training institutions**

A methodology must be developed for obtaining suitable data for measuring the success of school leavers in the labour market. The surveying of the opinions of employers, parents and school leavers could also be of great help. Eventually, the method should be apt to objectively

assess the institution's success in the light of performance in the labour market, which then should motivate the institution in question to adjust its training supply accordingly (e.g. by taking into account students' abilities before entering the institution or the characteristics of the local labour market).

### ***5.5. Recognition of informal and non-formal learning (2nd priority)***

In knowledge-based societies not only the forms of learning but also the sites of learning are subject to change. The workplace should increasingly become an organisation facilitating learning. In the future, the role workplaces assume in the training of employees will be especially important. It is crucial that a growing number of workplaces should provide opportunities for learning, and that ties between economic and business activities and learning be established.

For Hungary's economy and social care provision schemes, the effective employment of the adult population has become more important than ever. Even if non-formal and informal learning constitute a considerable area in terms of a labour-market perspective such forms of education have no significant value when seeking a job, and the recognition of such forms of learning are problematic. The present education system and the labour market accept and recognise knowledge contents accumulated only within the framework of formal learning. In the case of further education, there is no established system for the recognition of expertise, experience or competences acquired in the course of non-formal learning, at the workplace or any other areas of life, either in the family or in the household. Employers usually express their reservations about the recognition of knowledge acquired in this manner. At the same time, HRDOP Measure 3.5 of the National Development Plan (development of non-formal ways of training) is an innovative step towards resolving the issue of the recognition of such knowledge contents.

#### **▶ AREAS OF INTERVENTION:**

##### ***Creation of a new service provision model and the transformation of vocational education and training in order to facilitate the recognition of informal and non-formal learning***

The successful implementation of lifelong learning can only be realised through the enhancement of individual motivation, through widening the range of learning opportunities, and through offering a wide variety of non-formal and informal ways of learning. In other words, learning demand must be increased in line with the supply of learning opportunities, particularly in the case of those who formerly did not benefit from learning and training. Increase in demand may be realised through both the applied practices for the recognition of non-traditional forms of learning and the associated institutional background, whereas supply may be boosted by the active involvement of the media and alternative training solutions (e.g. community learning).<sup>16</sup> Recognition plays a major role in providing for the financial

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<sup>16</sup> For the purpose of this strategy, traditional forms of learning refer to learning carried out in the context of an educator-educated relationship, which, in most cases, takes place within the framework of an educational situation at a specific place and time. Conversely, non-traditional forms of learning, such as community

sustainability of lifelong learning. If this system operates successfully, individuals obtain the necessary level of qualification within a shorter time and for lower expense.

The solution could be a new model based on personal counselling, the recognition of existing competences and the provision of flexible opportunities for learning.

The modular transformation of the structure of vocations allows for the repeated return to the system of vocational education and training. Within the framework of Measure 3.2 of HRDOP, by 2006 the competence-based modularisation of vocational qualifications recognised by the State will have been executed and the determination of the necessary input levels will have been realised. Modernisation in the content of vocational education and training, by means of the development of general and specific competences, also takes into consideration labour-market demands. Planned development in the near future will create an opportunity for adults without vocational qualifications to prove being in possession of practical skills and after further training to enter the world of work by acquiring formal qualifications. By the establishment of the envisioned system, the foundations for the recognition of formerly acquired knowledge within the course of formal or non-formal learning will be laid.

**Personal education identifier code and data transfer to the Europass system for the recognition and registering of learning<sup>17</sup>**

The modernisation of the NQR presupposes a system for effecting individual registration and central record-keeping. In respect of the above, the strategy established by a number of Member States refers to the necessity of creating a personal learning pass and the establishment of a related information system executing national level registration. Such a system will play a decisive role in the monitoring of drop-outs and the organisation of “second chance” programmes. As stipulated by the act on vocational education and training, the creation of a central registration system of vocational examinations for the attainment of vocational qualifications specified in the National Qualifications Register is necessary with respect to school system and non-school system vocational education and training. The introduction of the central registration system of vocational examinations allows the central registration of those having a vocational qualification for statistical purposes, the recording of examination results of school system and non-school system training, the central registration of the qualification levels of the active age population including the economically active, and the information management of vocational education and training.

Upon issuing the vocational qualification certificates, at the examinee’s request, the head of the examination organiser body is required to issue a certificate supplement in accordance with the relevant European Union documents that provides information and supplementary data for employers on the criteria of successfully obtaining the certificate (as part of the Europass system).

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learning or the establishment of communities for learning, as well as forms of learning through shared electronic databases, electronic exchange of information, and novel tools of knowledge management, characterised by jointly creating pools of knowledge rather than offering knowledge transfer, can also result in competences worth recognition.

<sup>17</sup> Europass currently consists of an EU-standard CV (EU-CV), a higher education diploma supplement (diploma supplement), a certificate of studies pursued abroad (Europass mobility), a certificate of foreign language skills (language portfolio) and a certificate supplement.

### **Establishing a complete system of recognition**

The recognition of non-formal and informal learning necessitates the creation of a complete system of recognition, during the development of which the recognition and accreditation systems of EU Member States should be considered in line with efforts of harmonisation. The first step of this process is the harmonisation of academic and post-secondary vocational qualifications and the vocational qualifications listed in the NQR, the development of the recognition methods of qualifications, competences and skills gained in the course of formal learning counting towards training, training period and examinations. The second step, however, is the recognition of non-vocational education and training (including training sessions facilitating general competences). Recognition is one of the most effective tools to generate employer interest in cooperation with education and training institutions, information systems and advisers.

According to the proposal of this strategy, it is expedient to start the execution of the tasks of modularisation and accreditation in international cooperation, and allowing the private sector interested in content development a say in this matter. The recognition of knowledge acquired through formal and informal learning calls for the restructuring of the NQR as specified in Measure 3.2 of HRDOP.

### ***5.6. Supporting disadvantaged groups and groups at risk in the labour market (1st and 2nd priorities)***

International surveys prove that, in terms of the basic skills (e.g. writing-reading, learning skills), primary school is unable to adequately prepare students aged 6-14 years for further education and consequently for lifelong learning. Some 6% of primary school pupils drop out before completing the eighth grade. Four to five percent of those having completed primary school do not continue their studies in further education. More than 23% of the young attending specialized secondary schools do not obtain a vocational qualification (OM Statistics 2003/04). The dropout rate of those attending vocational secondary schools is on the increase: that is the number of those who do not obtain secondary school leaving certificates and later vocational qualifications increases. This ratio among school leavers in 2002 was 25%.

International comparative surveys also point out the proportion of those 15-25-year-old persons who do not attend educational institutions and are not employed is extremely high. These groups generally complete only primary education, and do not have a marketable qualification. Within the total population, 11.2% (952 thousand) of the population older than 15 years did not complete their primary school studies.

The working-age population of nearly 7 million is many times the size of population learning in the school system. The majority of the population aged between 15 and 64 (or 25-64) will fall within the category of the active-age population even 10-20 years later, including those persons who, at present, due for example to their low level of employability are driven from the labour market. Therefore the focal point of the strategy of lifelong learning should incorporate this target group as well.

In the case of certain social groups, learning opportunities are apparently worse than those of the majority. Within this disadvantaged group, the Roma, disabled people, those with low-level qualification or not having a marketable vocational qualification, early school-leavers, those leaving penal institutions, residents of such institutions, inhabitants of underprivileged settlements and homeless people are over-represented. The growing group of migrants should also be mentioned, as well as the children of migrants who cannot participate or face difficulties in participating in high-quality education owing to linguistic and social disadvantages. The situation of women is of special concern in all groups, their learning is further hindered by family obligations and social prejudices. While one quarter of women who hold a degree of higher education have attended at least two training programmes, the same ratio is merely 2% in the case of disadvantaged women with bad labour-market prospects. Last, but not at least, the group of the elderly (over 55) must also be mentioned. According to the publication of HCSO on lifelong learning, which encompasses data submitted to HCSO on labour force recruitment, a mere 5% of participants of any training programme are over 55 years of age.

Social cohesion is not only threatened by the growing disparities between the various social strata, but also by disparities emerging between different regions and municipalities. The structure of Hungarian municipalities has considerable effects on schooling opportunities, in fact, at all levels of education. Examining the capital and county towns, it is realisable that the differences between opportunities become increasingly marked. Whilst in Budapest and county towns approx. 16-17% of a generation can pursue university studies, this ratio is only 8.2% in towns counting more than 50 thousand inhabitants. The situation that is most grossly unfavourable is that of the young living in villages where only 1.2% of the relevant age group is admitted to some kind of higher education institution. While the headcount of universities and colleges doubled, this did precious little to improve the education opportunities of the rural population. The trend in fact is quite the contrary.

## ► AREAS OF INTERVENTION:

### 5.6.1. Preventing dropouts

Poor learning performance leads to dropout only if it is accompanied by an attitude of rejection of the school and the institution of learning, that is if it is paired up with a form of behaviour unacceptable for the school. Despite the fact that behavioural problems in school can be traced back to causes in the family or the social background in most of the cases, the school also has a major role in increasing the dropout rate. The school is most likely to react to the symptoms of behavioural problems instead of investigating and eliminating its causes. The most frequent reaction to the symptoms is the concealment of problems and the practice of selection. Selection is often accompanied by false ideologies, which prevent effective educational procedures. Dropping out therefore should not to be traced back only to the failure of children, but also to that of the school. Pedagogical failures of this type are therefore not exceptional anomalies, but the necessary consequences arising from the present operational mechanism of the school, and are the result of school management problems. Among these reasons the problem of school management, the size of schools, the evaluation of the work of teachers, an authoritarian school structure and the impersonality of relationships are the most influential factors.

### **Development programme for vocational schools**

The development programme for vocational schools linked to the measures of HRDOP provides assistance for student career-building and contributes to the training of specialists who possess expertise meeting labour-market demands including the facilitation of entry to the labour market and the development of the competences required for lifelong learning. The objective of the latter is the development of certain basic skills thus facilitating a decrease in dropout rates.

### **Propagation of integrated education**

Integrated education promotes successful school participation of disadvantaged and Roma children as well as the elimination of segregation by providing standard level co-education to children of parents with different social status and different school qualifications. Furthermore, marked attention should be paid to ensuring equal opportunities for the disadvantaged and people with disabilities, the elimination of all forms of segregation, the creation of an inclusive school environment in public education. Having regard to the segregation of the society (including residential segregation), programmes and methods suitable for the realisation of integrated education in various social contexts should be drawn up.

This form of education is not only in the interest of disadvantaged groups: it equally assists mainstream groups in learning to overcome difficulties in communication, interaction and co-habitation. Thus integrated forms of education are the fundamental ways of learning democracy. It is important that this form of education provides for separate education sessions for children struggling with learning difficulties. At the same time, it must also be ensured that children enjoying privileges in the present system and their parents realise that they also benefit from integrated education.

### **Levelling out regional differences in education and training**

Regional differences are in close connection to structural changes of the economy, the increasing proportion of social groups with multiple disadvantages in the society and the existing infrastructural deficit. The mitigation of the differences in opportunities for education and further education originating in the peculiar regional structure of the country – and especially certain underprivileged regions – is a priority issue.

One of the most important elements of the solution to the prevention of the problem of lagging behind and failure in school is the drafting and the dissemination of school-based and local solutions. Those local initiatives that have proven successful in this field need appropriate support, should be accessible by others and at the same time should gradually be incorporated into the mainstream of education. It is necessary to launch specialised programmes and to reduce the time needed to access such programmes. Moreover, it is important to transform the structure of occupations relying on the experiences of developed regions while observing the changes of labour structure.

In line with the needs of the local economy and labour market, the structure and management of education and vocational education and training demand development at regional level. To this end, an enhanced participation of the education sector in the shaping of regional policy must be ensured, and, on the other hand, the regional role and development-oriented role of higher education institutions should be strengthened and the contribution of schools to the

development of the given region and the establishment of an active relationship between the schools and municipalities must be facilitated.

#### **5.6.2. Chances to pursue lifelong learning**

##### **Rethinking social assistance and creating an environment facilitating learning and work**

When trying to integrate young unemployed dropouts the first task is to phase out conflicting interests and to facilitate the creation of a system.

##### **Dissemination of part-time employment solutions**

Besides the system of incentives there is a need for a range of jobs that guarantees flexible working hours, and a combination of non-formal learning, positive environment of peer groups and paid part-time employment for young people without employment. At the moment such forms of training are not available; their development requires international cooperation as well.

Even if making part-time employment solutions widespread is not directly related to lifelong learning, the strategy must make it clear that without such solutions the flexible learning-working model cannot gain ground, and that without workplace socialisation and the chance of employment the efficiency of training-learning processes remains low. It is for this reason that many countries operate a second chance or work-school network, which the EU is attempting to disseminate in the new Member States by means of the EQUAL Programme. Facilitating the extension of part-time employment by legislative and financial tools is a field of special policy the drafting of which goes beyond the limits of this strategy.

##### **Devising an individual training programme for women on child birth and child care leave**

Women on childbirth and child care leave constitute a separate subgroup of non-learning and non-working groups. In our case, having a child – particularly having children – may mean that the woman leaves the words of work and puts off building her career, and as a result the qualifications she has acquired earlier become obsolete. From the point of view of social, economic and population policies, it is urgent to develop a specific training programme which offers a “second chance” for women contemplating a change of career providing for flexible forms of learning suited to child birth and child care leave. It should be noted here that there exists a good practice of making it possible for those receiving child care allowance and child care benefits to participate in higher education free of any charge. The re-entry of women to the labour market was, for example, facilitated by programmes supporting such women to become entrepreneurs. Women with children may participate in training with their children concurrently engaging in quality activities managed by specialists in creative learning centres established for creating conditions of early learning.

##### **Improving the qualification level of the working age population**

There is an excess of supply in the adult training market, therefore the focus should be shifted towards demand, in particular towards generating demands within disadvantaged groups. However, besides creating demand, these groups equally need facilitation of access opportunities. The accessibility of training should be improved by means of flexible forms of training and the recognition of formerly acquired knowledge. Furthermore, it is important to introduce special curricula and teaching methods which are tailored to the special learning

needs of the disadvantaged and especially of those with low-level qualifications. It is expedient therefore in the training system to make room for pilot projects which address these problems.

It has been established that the unemployed facing real disadvantages and/or training difficulties, average employees having no further training (including those engaged in tele-working) and elderly employees are excluded from adult education. The qualification of the older generations is especially low. (71% of the generation aged between 60 and 64 years have primary education qualifications, 19% secondary education, whereas 10% have higher education qualifications; the corresponding ratios for those aged between 25 and 29 years are 22:59:19.) As a result, elderly employees are more likely to be exposed to threats due to the outdating of their knowledge, in their case what is needed is vocational further training, and the acquisition of certain general (for example basic computer skills) or language skills. The addressing and inclusion of these groups require the drafting of a separate strategy for the expansion of adult education.

### **Rethinking the support scheme of adult education**

While the costs of further training of experienced elderly employees must be borne by the employer, in the case of the elderly unemployed and the inactive population a change in vocational orientation or the attainment of a second vocational qualification could be the proper solution. Therefore – in compliance with Government Resolution 1069/2004 on the directives and action plan of the development of adult education – it may be desirable to make attainment of a second vocational qualification for people over 50 years of age free of charge by means of providing state subsidies.

The present support scheme, by way of the personal income tax allowance, provides assistance, on the one hand, to those who are likely to participate in training irrespective of being granted support or not. On the other hand, by means of the adult training normative support, which is granted to enterprises offering adult education services, the range of services is also improved. The Hungarian adult training market is characterised by an oversupply, the number of registered training establishments is around 1000, whereas the number of those delivering accredited training is 600-700. There is an excess of supply in the adult training market, therefore the focus should be shifted towards demand, in particular towards generating demands within disadvantaged groups.

Since the further training of highly qualified employees is cost-effective, conditions must be created which allow for the safe planning of expenditure and cost-effective nature of training both for the employer and the employee. Such an example is the stipulation of the obligation of repaying the tuition fee in case the employee quits the company within a certain period of time following the training paid by the employer.

In the case of certain groups of disadvantaged employees, however, besides the creation of favourable conditions (for example training period accounts, part-time employment and flexible training opportunities) there is also a need for complementary or full financing. In many cases, these groups do not enjoy any direct benefits from the training, or even if they do, they are not able to pre-finance future returns. The State at the same time is able to support the training of these groups in the hope of longer-term returns (increase of employability, preservation of jobs, lower unemployment-related or social expenditure).



## **5.7. *Establishment of a novel teaching/learning culture (5th priority)***

Another key actor of lifelong learning (besides the learner) is the teacher, the trainer. Teachers constitute an occupational group with an extremely diverse internal structure, whose intersectoral and intrasectoral mobility is uncertain. The vocational requirements related to the profession are inadequately formulated, work load, as viewed as part of an international comparison, is uneven and low with salaries being relatively low and fairly insensitive to the quality of the work performed thereby rendering professional practice of the occupation more difficult.

By stressing the development of key competences in training within the school system, traditional “knowledge-transfer” role of teachers will change. The ability of executing learning and work individually, the ability to deploy different culture related techniques individually and efficiently, and the ability to function and work in groups and in a multicultural environments are fundamental expectations of the modern society and the workplace which primarily teachers themselves, acting as mentors, should meet in order to be able to facilitate such development of their students. Traditional methods of education are insufficient to this end. Moreover, certain methods in fact counteract development of this type. Therefore the range of applied methods and contents of teacher in-service training must be broadened on the one hand (differentiated techniques to satisfy the demands of students with special educational needs, group-building in a multicultural environment, integration of ICT culture into teaching, etc.) and, on the other hand, by creating opportunities for professional self-reflection, and support for the development and sustenance of such self-reflection through the facilitation of the dissemination of good practices.

### **► AREAS OF INTERVENTION:**

#### **5.7.1. New teacher roles**

The differing socio-cultural background of students necessitates the application of a differentiated educational tools and a new educational-methodological approach. Teachers must be able to work in heterogeneous groups; the creation of opportunity and working with integrated student groups must constitute a natural part of teachers’ jobs.

#### **Enhancing the ability of teachers for self-development**

The “revolution of the teaching profession” needed for modern learning necessitates primarily the M.A. level and further development of initial teacher and educator training, in-service training and the training of instructors. Facilitation of the practice of school-based training is to be encouraged in teacher training. The teacher of the 21st century is envisioned as an intellectual who deems his/her own professional development important and who executes work individually. The acquisition of the process of lifelong (self-)development is an essential element of the preparation for the teaching profession. It is becoming ever more necessary for beginner teachers and teachers already in service to become able to plan their development paths themselves. However, at the same time teacher training (as a system) assumes great responsibility in incorporating the elements needed for the acquisition of competences requisite for lifelong learning into the system of training and in-service training, as well as in

establishing a new culture of methodology. The National Development Plan includes several measures aiming at the renewal of the methodological culture of teachers (HRDOP 3.1).

### **The model of learning organisation**

By strengthening the system of – the currently modern – in-service teacher training and by incorporating incentives, national groups of teachers can be turned into “real learning circles”, especially by simultaneously transforming workplace relations. As part of transforming workplace relations, it is advisable to keep in mind the recommendations drafted by the most well-established European employer organisations.<sup>18</sup> As appropriate, possibilities afforded by local contracts should be strengthened, together with the development of a differentiated compensation system proportionate to the amount of work executed.

### **Training and in-service training of teachers, adult trainers and specialized teachers**

It is indispensable to continuously develop specialists engaged in adult education and trainers operating on an ad hoc basis. By now, adult education has become an extremely differentiated (e-learning, the disadvantaged, alternative learning techniques, etc.) and developed area of the global education sector, where Hungary has to make up for a serious deficit despite all national efforts already made.

The launching of accredited teacher and in-service teacher training programmes aimed at methodological development in the fields of career guidance and career selection must be fostered with a view to efficient counselling and change of career related activities. The range of in-service teacher training programmes must be broadened and directed towards the acquisition of competences that are necessary for rapid responses to labour-market challenges, to the teaching of disadvantaged children and children with special educational needs as well as to the integrated education thereof. It is also important to establish the system of in-service training in higher education.

In higher education, in certain areas of specialized academic training in almost every case it is ex-researchers, who teach prospective teachers, which from a scientific point of view could be advantageous, but from the point of view of preparation for the teaching profession it is definitely not. Therefore, it would be justified to improve the methodological culture of those teaching in higher education.

In the case of teachers of lifelong learning operating outside public education (e.g. specialized teachers, adult trainers) the task is not so much the renewal of traditional frameworks and contents, but rather the creation of new frameworks. Professional initiatives and professional practice are referred to here, which conceptualises the professional requirements of assisting formal, non-formal and informal learning and aids those working in this field in realising better performance levels. To this end, it is expedient to work out the curricula of professional-methodological training programme manuals which are available to specialized teachers and adult trainers alike. Furthermore, it is crucial that research groups of teacher-training universities should draft the methodology of adult education and make such initiatives accessible for companies and organisations involved in adult education.

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<sup>18</sup> Empowering teachers and the modernisation of school management – From the perspective of the employer. Budapest, OKI, 2003.

### **International mobility in teacher training and in-service teacher training**

With the expansion of international mobility, the opportunities of pursuing studies abroad as part of initial and in-service teacher training will be encouraged. If the European (intercultural) dimension of the entire education system is to be focused on, teachers are to be in possession of foreign language skills and intercultural practice.

Application-based support should be granted for teachers coordinating international co-operations, and those who participate in a co-operation project in an organised form satisfying specific criteria. Application-based support should also be provided for the purpose of granting substitution remuneration for teachers on leave within the framework of school projects or as part of an individual mobility action (in-service training abroad).

The set of criteria of the professional career plan of teachers must incorporate experiences acquired during participation in international work.

### **5.7.2. Quality culture**

#### **Establishment of a national system of measurement and assessment in public education focusing on knowledge contents and key competences compulsory for all**

The implementation of a system of measurement and assessment independent of the operator and the school is an indispensable element of the operation of a just and fair education system based on knowledge and the quality of education, which at the same time would motivate public education institutions for the modernisation of their educational work. In this respect, the wide publicity of required knowledge contents and measurement outcomes is of supreme significance: this, based on public consensus, allows for the public articulation of requirements concerning learning outcomes and teachers' work. Conclusions drawn on the basis of measurements supplemented by institution-wide self-assessment and quality-oriented forms of financing and compensation stimulate public education institutions more than any curricular reform for the modernisation of their work and the maximisation of educational added value.

#### **Disseminating quality assurance**

The framework of quality assurance must extend to higher education institutions and activities of adult training. The quality assurance system of adult education should take note of the peculiarities of adult education (age, training and working at the same time, recognition of former studies, etc.).

The precondition of the implementation of such a system is the supply of multilevel quality assurance activities diverse in function, and the establishment of a quality development service network. The combined incorporation of national and international experiences guarantees the emergence of a modern institution development system, which builds on self-development and self-assessment activities executed by the individual institutions. With a view to enhancing the effectiveness of education, further development of the system of measurement and assessment, the contents of internal and external measurements (institution, programme, teacher, student), and the system of the implementation of measurements are instituted in line with the NCC, the requirements of state recognised examinations and the criteria of full-scale institution assessment.

With respect to the dissemination of quality assurance, it would be relevant to conduct professional discussions as regards the question of who the customer is in the education

sector, interpreted in the entirety of the sector or in certain sub-fields of the sector, what his/her demands are and to what extent these are satisfied in education.

For the sake of building social partnerships and the realisation of EU requirements, the implementation of a system both securing the stability of the national measurement system and granting independence in professional management, as well as the development of the currently absent sectoral (operator and national) assessment system are priority tasks.

### ***New priorities in the content of examinations***

An important pillar of strengthening learning bases is the consistent use of new learning methods as part of assessment and examination requirements, and the setting up of independent examination centres. This may bring a real change in the shift of priorities in the content and methodology of education towards novel competences. In the past decades examination requirements (school leaving and vocational related) primarily targeted acquired knowledge with less emphasis on skills and competences. As part of the latter, more effort should be exerted in measuring learning competences and key competences. In the re-conceptualisation of the function of the basic examination, aspects of lifelong learning should be represented. Basic examination should measure the acquisition of basic knowledge, communication and tool-use related competences to be attained in the school and in relation to which the testing of isolated knowledge contents should not be overemphasised.

## **6. BUILDING A SYSTEM OF LIFELONG LEARNING**

Providing momentum to the seven key areas discussed in Chapter Five will enable Hungary to bridge the gap between her and the EU 15 States in the field of lifelong learning. Requirements established by the European Union and the OECD call for a coherent system of activities, going beyond sub-sectoral development and measure packages. At the same time, no feasible implementation of strategy objectives can be envisioned without establishing the missing mechanisms systematically and applying a development policy that facilitates the building of a coherent system. This chapter takes into account those special policy principles that are indispensable for the establishment of action plans targeting the systematic development of lifelong learning. The majority of these elements support Priority 3 of the target system.

### ***6.1. Supporting innovation***

Development and innovation has a crucial role in an education policy promoting competitiveness. Innovation means the continuous renewal of methods, technologies and tools of the dissemination of knowledge. Prioritising the dissemination of knowledge requires specific regulation and management conditions. Regulatory frameworks promoting change on the one hand and capable of assuring reliability on the other hand within a changing system as well as capable of guaranteeing a level of quality shall be established. This requires the application of specific control tools such as accreditation, which allows for the entry of new initiatives while providing for their harmonisation with the existing system. Innovation funds have a similar role: they allow for the financing of local initiatives and guarantee that they are executed along specific priorities. As such mechanisms have been established during the past few years, the task is to improve their functionality.

On the national level, innovation plays a crucial role in the improvement of the services provided by the education system if results are sustainable, distribution is a matter of system level networks and this innovation is incorporated into the system of quality assurance.

As far as granting technological discipline and quality is concerned, Hungary's educational system including the currently up-and-running processes, offers great potential. Assuring the quality of education and providing schools and universities with appropriate tools shall be a long-term objective of education policy. As regards technology, education and learning are rather underdeveloped, the use of modern, efficient teaching methods and tools is quite limited and schools are not keen on applying new technologies promoting effective learning. This area calls for a real breakthrough. Compared to other countries of the region, the adaptability of the Hungarian education system is quite good. However, this requires external reinforcement and support exceeding the current level of this reinforcement and support.

Education supporting competitiveness and wishing to promote its own competitiveness should pay special attention to the availability of a proper knowledge base for educational development. The majority of groundbreaking technical and technological solutions are created in international scientific workshops that are mainly connected to market leader

multinational companies. Countries with a moderate economic potential can have a share only if these international workshops involve them in their activities. The main criterion is that the country concerned should have cutting edge research workshops, i.e. Centres of Excellence. Such centres come about as a result of a longer progress and currently existing ones require deliberate support to stay alive. These workshops often work in co-operation with universities, so they have a considerable influencing effect on education.

## **6.2. *Managing and maintaining institutions***

The issue of the role, position and possibilities of managers of educational institutions should become a part of educational development programmes. Regarding the institutional autonomy present in education, their role is so definitive that it is a key issue to elaborate on the innovation elements of work of such managers. The training of managers and decision makers in the field of education (managers of institutions and operators) is indispensable for the local operation, efficiency and quality of lifelong learning.

Local and county institution operators decide about the educational programmes of institutions of education, so it is their task to guarantee the possibility of lifelong learning for citizens. It is particularly important in the case of poor and undereducated people who do not have the opportunity to use distance education learning tools or to attend courses in remote institutions. For this reason, it is the task of local education management to provide them with access to learning.

In order to provide quality services and make arrangements for their utilisation, the managers of educational institutions should be aware of the latest educational tools, the possibilities afforded by educational management and financing, as well as the inter-sectoral approaches for making educational policy successful. It is important that these local initiatives should have an influence on integration and social cohesion. As there is no legally guaranteed mandatory training for heads and managers delegated by the operators of educational institutions funded by the local government or other actors (churches, foundations, private institutions, etc.), and there are no regulations stipulating the guaranteeing of lifelong learning on local or county level, the main message of the present strategy to the operators is that it is their professional, political and moral task to create such educational demands of local citizens and to satisfy them.

Since regulations do not extend to the education and training of adults above the minimum school leaving age as a mandatory task, local leaders are particularly responsible for this issue. Educational content related courses offered by nationally accredited educational manager training institutions should include the establishment of an integrated adult education and training programme targeting social cohesion as well as the creation of related technical tools, quality and efficiency indices. Local decision makers should coordinate the range of local adult education and training programmes offered and they should provide for appropriate efficiency and quality standards in order to provide citizens with appropriate education services. Citizens with a low level of education and without marketable skills should be provided with a range of options motivating them to participate in lifelong learning, in conformity with labour market forecasts, and offering the possibility of creating local social cohesion.

### **6.3. *Financing***

#### **6.3.1. Individual, public and private investments**

Individuals, employers and the State shall all take their responsibility in establishing and operating the system of lifelong learning. While individuals and employers make decisions about the scale of investment in education and training, the State should take steps to encourage investments and guarantee the quality of training, and, further, it should increase invested amounts through additional financial contributions.

The more widely people recognise individual advantages resulting from education, the more likely individuals are to access learning opportunities suited to their own needs, making their own decisions and using their own resources. Naturally, it is true only in the case of higher levels of education directly affecting individual labour market positions and particularly for adult education, but the differentiation of demands may trigger similar processes at lower levels of formal educational systems.

Apart from public financing, funding provided by actors (economic organisations and private persons) is gaining increasing significance in each field of education these days, even in the field of public and higher education. An increased contribution by the actors of the economy can only be expected if investments in lifelong learning comply with quality requirements and will contribute to the promotion of the financial position and competitiveness of economic organisations in a determining way.

In the light of the establishment of the system of lifelong learning, Hungary has a special role: she can use funds provided by the European Union in an unprecedented way. Several measures of the Operational Programme of Hungary's First National Development Plan for 2004-2006 assist an objective corresponding to this strategy. However, establishing the system of lifelong learning should not be considered a field fully covered by the measures of the National Development Plan, although investments financed by the European Union, complemented by a considerable level of national funding, have resulted in a sort of abundance of resources during the development of the supply side.

Figure 3 shows the channels of financing lifelong learning in Hungary. (The list contains the major sources only and includes individual contributions, too.)

**Figure 3: Financing lifelong learning in Hungary (2004)**

(1) Training within the school system	normative financing own revenues Training allocation of the Labour Market Fund operator's grants (tuition fees, refunding of costs)
(2) Education outside the school system adult education	normative support tax allowance training provided by companies for employees Labour Market Fund tuition fee (examination fee included)
(3) Labour market training programmes	Labour Market Fund (income supplement)
(4) Higher Education	direct public funding of institutions research funds (Hungarian Scientific Research Fund /OTKA/, National Office for Research and Technology) Research and Development agreements tuition fees paid by students not receiving state support thematic and target group related training agreements Training allocation of the Labour Market Fund tuition fee (examination fee included) tuition costs paid by students

### **6.3.2. Efficient financing**

In previous years, in contrast with the relative abundance of resources allocated for the development of the supply side, the development of the demand side has been fairly neglected.

In order to boost demands, first of all the harmonisation of the financial incentive tools of lifelong learning should be effected. Relevant implementation regulations of the act on adult education create financial interests on the service provider side. However, it is still unclear how large numbers of adults can be motivated and stimulated to participate in lifelong learning. This is especially problematic for the low-level qualification or disadvantaged population so far unreachable for labour-market training.

Increases in demand could be realised by the more efficient utilisation of budgetary resources. Sectoral fragmentation, however, practically makes the sometimes indispensable reallocation of budget resources unfeasible. Increases in resources should always be accompanied by a rise in existing training capacities in certain target areas, whereas the financing of training supply should be accompanied by quality assurance programmes.



As far as the funding of lifelong learning is concerned, in developed countries the dominant model of investment in learning is based on the principle of co-financing. Co-financing models – in line with the learner-centred and demand-driven nature of lifelong learning – in the majority of cases are based on new forms of financial incentives and tools that aim to support individuals, particularly those whose participation is at risk due to learning related expenses and costs.

#### **6.4. *Social consensus based co-ordinated development***

##### **6.4.1. Social partnership**

The establishment of the system of lifelong learning requires the application of social partnership on several levels. On the level of system building and management, the harmonization of the work of steering and interest reconciliation organisations is of key importance. In addition, the methods and applied practices of social inclusion and participation necessary for the implementation of special policies must be facilitated. It is desirable, for example, for every major national organisation of interest representation to establish a concrete action plan for the facilitation of the popularisation and implementation of lifelong learning.

In order to establish the system of lifelong learning, in the development phase it is necessary to involve sectors such as youth policy and public education, which affect informal learning at a younger age. Furthermore, in this respect, health care is of key importance in adult education, social and family affairs are conceived to contribute to the success of old age learning and public collections, for example libraries, are institutions affecting learning at all ages. Various organisations of interest representation (both on the employer and employee side) and chambers should also have a considerable share in lifelong learning. Organisations of minority interest representation and municipal organisations acting as one of the social partner groups participating in lifelong learning should be equipped with a completely independent professional approach and separately allocated resources. It is also important to maintain constant social communication on the strategy.

##### **6.4.2. Intersectoral cooperation, development and operation**

According to public opinion, education is increasingly viewed as one of the most important aspects of social and economic policy. The harmonisation and coordination of various development policies is not yet ensured. The regulation of the system of lifelong learning is not yet solved and the relations between the individual sectors concerned in system building as well as the devising and operation of proper adaptation and coordination mechanisms are problematic.

In the European paradigm of lifelong learning, the issue of the modernisation of applied government methods has appreciated. This will be more visible in the new regulations for the programming period of 2007-2013. Lifelong learning could serve as an excellent field for the testing of new governing techniques, policy coordination mechanisms and tools. At the same time, the above field can become a sort of reference point for the entirety of public administration. This approach of system building makes it possible that for example the

human resources development policy supported by the Structural Funds within the period of 2007–2013 will not exhibit a simple “patching together” of departmental concepts, but will rather be characterised by individual government-level initiatives.

As regards the system building nature of the strategy, the key question here is the continuous control of the development and operation of the system. In an attempt to effect harmonization with EU expectations and the practice of several Member States, the strategic coordination of lifelong learning should be realised at governmental level. Setting up an interdepartmental committee containing the representatives of the ministries concerned that operates in addition to government-level coordination seems expedient. In such a system the ministry responsible for the coordination of development policy would involve the human policy ministries concerned in the implementation. The implementation of tasks arising during coordination and monitoring is envisioned to fall within the competence of the ministries concerned.

#### **6.4.3. Devising a quality management, control, measurement and assessment system**

Effective and quality education is only feasible if the normative requirements (i.e. standards) of good quality operation are specified, and these are regularly compared against the processes and outcomes of institutional operation, whereby in the case of problems of compliance suitable intervention can be effected. The assessment of compliance with the standards is one of the most crucial functions of modern public education management. In the process of assessment, the accreditation by professional bodies is gaining increasing importance. This to a large extent has been successfully integrated into the Hungarian practice.

Specific steps should be taken so that the development of measurement and assessment practice serve the efficiency of lifelong learning. At a national level, student assessment as well as qualification and examination systems should be altered so that they

- assess basic learning competences (skills) that are, by public consensus, valuable in the market at the branching of learning paths and upon entering the labour market,
- provide valid and reliable information for users (examinees and the parties making decisions on the basis of the results),
- should be independent from the institution preparing students for the examination,
- should exhibit a standard level of difficulty year by year.

The assessment of institutions, the financing of teacher performance should be realised with a view to educational added value. As part of the institutional quality management system, schools and institutions of higher education should be compelled to realise continuous improvement in quality in line with set goals corresponding to the characteristics of the given institution and should receive operator and state funding for this purpose. The employment and professional career plan of teachers should be designed with this in mind. Through the continuous development of institutional operating standards and the continuous monitoring thereof by professional networks, the systematic dissemination and introduction of innovation can be ensured.

### **6.5. *Lifelong learning in the context of European cooperation and global competition***

In its development policy, the European Union goes back to a long tradition of stressing the links between education and training as well as employment and the labour market. Based on the requirements of the establishment of knowledge-based society and adaptation to the conditions of globalisation, through the paradigm of lifelong learning, the Lisbon strategy has reformulated the strategic importance of education, training and learning with respect to boosting competitiveness, strengthening internal social and economic cohesion, and with a view to the further development of the Union's political unity. The realisation of the objectives established by the Strategy requires, among others, broadening the cooperation between the Member States and the facilitation of the creation of new methods and tools. In the framework of the Lisbon Process, the EU also deploys the so-called open coordination method in the field of education and training. The creative application of this new, currently evolving approach and practice imposes new requirements and sets new challenges to Hungary also in the field of the implementation of the strategy for lifelong learning, while it opens up novel perspectives for policy making in respect of international co-operation.

Although the coordination and financing of the trends of development outlined in the strategy are implemented in a national framework, it is already apparent that, in the medium term, a great majority of professional developments will extend over national borders, which could result in a regulation taking into account both the best practice of other Member States and the features of global competition currently evolving in the field of education and learning services. With a view to preparation for the proactive adaptation of the above, it is advisable:

- to harmonize the planning of regional vocational education and training with the labour-market demands and training supply of all European regions along the borders of Hungary where such harmonisation is feasible (Austria, Slovakia, Slovenia),
- to exploit the opportunities offered by EU level cooperation, including traineeship in partner countries (e.g. Leonardo Programme) with a view to developing the content and methodology of both vocational education and training and adult education,
- in adult training and higher education, to admit those organisations and/or private ventures that are already in possession of accreditation in their respective countries by means of an expedited accreditation procedure (including quality assessment),
- besides offering bilingual education, to facilitate the improvement of the competitiveness of higher education institutions in international research in areas producing economic and/or cultural benefits either for the Hungarian economy or for the trade of international services of education,
- to support bilingualism in Hungarian scientific life (as it has long been the case in Sweden, Finland or Italy),
- to offer the option of cross-border or joint measures as part of the second National Development Plan and the associated operational programmes,
- in the field of education and training, to develop international co-operation in the form of projects.

Education itself produces an increasing number of commodities that are, on the one hand, exceptionally appreciated in knowledge-based or information societies and, on the other hand, possesses a direct market value. Trading in educational goods is on the rise in the world, and in certain countries and regions trading in education has become a major item of foreign trade. This seems to indicate that this sector, traditionally considered dependent on public funds, is also emerging as a generator of revenue.

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