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THEMATIC ISSUE

THE TRANSFORMATION OF EDUCATIONAL SYSTEMS IN THE VISEGRÁD COUNTRIES

Guest Editors

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This issue is dedicated in memoriam to Professor Jiří Kotásek

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EDITORIAL

The journal Orbis Scholae, which focuses on school education and research on this subject, came into existence last year. It received financial support from the Ministry of Education, Youth and Sports of the Czech Republic, thanks to the project called "Research Centre on Schooling". We informed our readers about the project, its 7 main goals and focus in issue No. 1, 2006. A brief outline of the project in English may be also found at www.pedf.cuni.cz/reces. On the same web page, the texts of all the issues of this journal will be published in electronic form.

The journal is published twice a year in Czech with summaries in English. One issue is published in English every year. The first issue in English is finding its readers at this very moment. It is dedicated to Professor Jiří Kotásek. We also included a recollection of his life and work in this issue. It was Professor Kotásek himself who initiated, and provided theoretical reasons for the need of, a comparative analysis of educational systems in the four countries of the Visegrád Group. The goal of the international project, in which foreign partners take part, is to describe and critically analyse the development of school education from a comparative perspective and to contribute to the theory of educational reforms from the viewpoint of the transforming countries of Central Europe. In this monothematic issue, we publish the results of the first stage of the project. The contributions of specialists present case studies from Hungary, Poland, Slovakia and the Czech Republic. They describe the development, current state and problems of school education on the macro-level of national educational systems in the context of transformation processes. The case studies were created by different authors; however, they share a common theoretical framework for their analysis. Its structural components result from a methodological discussion and consensus that was achieved at the International Colloquium in December 2006.

Apart from the introductory study written by the project coordinator and case studies from the four countries, in this issue the readers can find an interesting article written by a Ph.D. student. In this article, the author tried to compare school reforms in the Czech Republic and Poland with reference to similar processes, different solutions and newly emerging problems. Further sections, reviews and news also present contributions from the field of comparative education.

It remains the wish of editors who prepared this issue of a new journal that it intensifies the interest of readers from the foreign educational community in research into school education in the countries of Eastern and Central Europe. The editors also hope that it will contribute to discussion among international experts concerning school education and the methodology for comparative research into its nature.

Eliška Walterová, David Greger

THE TRANSFORMATION OF EDUCATIONAL SYSTEMS IN THE VISEGRÁD COUNTRIES: INTRODUCTION TO THE CONTEXT OF COMPARATIVE RESEARCH

ELIŠKA WALTEROVÁ
Project Coordinator

At the end of the 1980s, the geopolitical map of the world changed. Dramatic and revolutionary events ended the period of Cold War and the bipolar division of Europe which had lasted four decades. The countries of Eastern and Central Europe that formerly belonged to the socialist bloc set out on a journey towards pluralist democracy, a market economy and a legally consistent state. Eastern and Central European countries do not constitute and have never constituted a compact unit. They are marked by a considerable degree of cultural, historical, geopolitical and economic heterogeneity. Certain groups bearing similar features may yet be identified within them. These include Eastern and Central European countries, South-Eastern European countries, Baltic countries and Eastern European countries. The group of post-socialist countries from Eastern and Central Europe, the so-called Visegrád Four to which Czech Republic, Hungary, Poland and Slovakia belong, was marked out from as early as the beginning of the 1990s (at that time, there was still Czechoslovakia) as the “top-of-the-class club”, convinced, and convincing Europe and the world, about its greater stability and maturity than other post-socialist countries. The Visegrád alliance was an organisation with a purpose and has remained a free regional grouping to this day.

What do these countries have in common except for geographical location and the fact that they are neighbours? One thing they share is common cultural and historical roots derived from belonging to the Latin-Christian cultural circle. Their educational systems were formed in conditions of industrial revolution, under the influence of Austrian legislation on education. Their educational model of a Central European type was significantly influenced by the German model. National aspects presented a strong determining factor in the development of school systems. A school system organised at national level was one of their traditional values. They achieved significant levels of development, especially during the interwar period in the first half of the 20th century. After World War II, these countries became a part of the socialist bloc and they went through a period of totalitarian regime and a one-party government system. They bore the consequences of international isolation, limitations to their economic systems and subordination to one great power within the security structures of Warsaw Pact and the economic structures of The Council for Mutual Economic Assistance (COMECON).

From the 1950s till the 1980s, the educational systems of these countries developed according to a strongly unified model enforced by a power base. They

were based on similar economies and similar requirements upon the labour force. The approach to education was determined not only by social stratification but also by political affiliation and the degree of conformity with the governing regime.

The political, economic and social changes that the Visegrád countries underwent from the end of the 1980s were so fundamental and extensive, and so deeply affected every area of life, that we can hardly find any parallel in history. They were characterised by very rapid change over a relatively short time, especially in the first transition period.

The political changes involved a loosening of central state government and the removal of a unified monopoly ideology, democratization of institutions and pluralism in politics, providing space for the creation of structures and mechanisms of civil society with participation in political decision-making. The paternalistic role of the state was replaced by one providing opportunities for individuals; it was, however, accompanied by demanding requirements for orientation and individual responsibility in a social environment with threatened the secure environment to which citizens had previously been accustomed. There was extensive reconstruction and privatization in the parts of the economy which belonged to the state (in Czechoslovakia all of it and in Poland and Hungary most of it). These fundamental changes were not launched at the same time in all the Visegrád countries. In Poland and Hungary, they were in progress from the second half of the 1980s whereas in Czechoslovakia they started with the "Velvet" Revolution. The extent of their penetration, however, was more significant in Czechoslovakia.

The process of social transformation did not happen to the same extent or in the same way in every area of society. They were accompanied by turbulence and significant variations, increasing and changing social diversification and differentiation according to property ownership. The last mentioned feature was also related to citizens' level of satisfaction with the state of society. Although the beginning and development of social transformation in the Visegrád countries was neither chronologically identical nor uniform, they all had one political goal in common: to join Euro-Atlantic structures and an integrated Western Europe. Therefore, their effort was not primarily motivated by common interest. The satisfaction of individual national concerns and a certain degree of competition among those countries pre-dominated throughout almost the whole of the 1990s. The adoption of the social model was also connected with different perceptions of change and with finding suitable solutions in each country separately.

How and why was the Visegrád Group formed and how and why did it develop? What are its current goals, activities and problems?

The Visegrád Group was founded at Visegrád Castle in Hungary on February 15, 1991 as a free union of Central European post-communist countries. The presidents of Czechoslovakia, Hungary and Poland of that time signed the *Declaration on Cooperation in Striving for European Integration*. The main goal of this cooperation was to provide for the security of those countries because the Declaration was signed in the circumstances of an economic and security vacuum which arose in this region after the events of 1989 and their consequences connected with the

dissolution of the Soviet Union and unification of Germany. At the same time, the whole socialist bloc as well as its economic and security structures fell apart. The intention to coordinate activities in the processes of preparation for joining NATO and the European Communities presented another significant motive behind the alliance. The Visegrád Group specified its goals as follows:

- to restore state sovereignty, democracy and freedom;
- to eliminate all social, economic and ideological remnants of a totalitarian regime;
- to establish parliamentary democracy and a modern state bound by the rule of law;
- to create and establish a market economy.

Later this consultative and informal alliance became more focused. Chronologically, it is possible to distinguish several stages in its existence.

The *Initiation Period* (1991 - 1992) was characterised by international political instability. The common priority was to provide for the security and stability of the region. Within the context of beginning the transition from a centrally planned economy towards a market economy, the capital flow in the given region was liberalized on the basis of bilateral treaties. The countries consulted on issues connected with the disappearance of structures constituting the former socialist bloc as well as on their views of international political events and security issues, in particular the evacuation of Soviet troops. Their common viewpoints were, however, not defined. Each country acted as a sovereign country and the evacuation of Soviet troops proceeded separately in each country. With regard to starting the transition towards democracy and providing for stability in the region, the Visegrád Group received the support of the European Community. The countries signed Association Agreements with the EU but failed to submit an application to join the EU.

The Period of Enforcing Individual Strategies (1993 - 1998) was caused by the absence of cooperation as well as by changes in government. In the Czech Republic and Hungary, in particular, the political elite did not accept the idea of regional cooperation preferred enforcing the individual political interests of their countries in their external relationships as well as in the European integration process. Slovakia was mainly concerned with problems related to the strengthening of their newly established autonomy and preferred to cooperate with Eastern European countries. Poland alone tried to maintain the Visegrád project running; gradually, however, it directed its efforts to establishing bilateral relationships with Germany and France, both being influential EU members, and cooperation with Scandinavian countries. Regional cooperation in trade was being developed thanks to the Central European agreement on free trade (Central Europe Free Trade Area - CEFTA) which the Visegrád Four entered into in 1993. Later on, Slovenia, Romania and Bulgaria joined the agreement as well.

The effort to speed up the process of joining NATO intensified bilateral cooperation among the Visegrád countries in the field of military security. The positive outcome of this effort was the acceptance of the Czech Republic, Hungary and Poland into NATO in 1999 and intensified help to Slovakia in catching up with

the delay in the integration process.

The Revival Period (1998 - 2004) was characterised by the efforts of political representatives to support cooperation among Visegrád countries. This cooperation, however, followed particular motivations. Poland maintained a view of multilateral regional cooperation; Hungary strove for completion of the integration process in particular and for handling nationality issues; Czech representatives attempted to harmonize approaches and requirements within the integration process; Slovakia looked for support while overcoming the delay in its integration into NATO, in preparation for joining the EU and redirecting foreign policy towards the West. A new document called *The Content of Visegrád Cooperation*, passed in 1999, defined the framework of cooperation, its priorities and mechanisms. Furthermore, a system of presidency rotation was approved, and meetings of presidents and prime ministers were held annually. Cooperation at ministerial, parliamentary and expert level was more distinctly outlined, in issues concerning foreign affairs, defence, culture, environment, transportation and health care in particular. The civic dimension was more fully developed. This dimension was reflected in the organizing of significant cultural, social and sporting events. Education and research were the areas where cooperation was growing stronger, including exchange study programmes, scholarships and grants for projects of young researchers and Ph.D. students. The *International Visegrád Fund* established in 2000 significantly contributed to the blossoming of these activities.

When all the Visegrád countries joined the European Union in 2004, new problems common to the whole group arose, together with problems both between and within each of the countries involved.

The Visegrád Group did not become a regional international organization in the traditional sense with internationally acknowledged legal status. The cooperation between the countries of this Central European region did not have any precisely defined institutional structure, organizational background or scope of activity. The only permanent institution was the Visegrád Fund which supported cooperation between the four countries in the field of culture, science, sport and education, as well as cross-border cooperation and the development of civil society. The Visegrád Group maintained the status of a regional grouping with a purely consultative nature based on informal cooperation and regular meetings of the countries' top representatives and experts.

With regard to their dissimilarity and the pursuit of their own individual interests, the Visegrád countries were not able to create a "bridge" between Eastern and Western Europe without the cooperation of other countries to which they were bound to be linked given their geopolitical, historical and cultural situation. To a great extent, however, they may take credit for maintaining the security of Central Europe during the stirring "vacuum" at the beginning of the 1990s. No consensus has been achieved so far on its future existence, the form of the grouping or on cooperation with, and the prospective admission of, other Central and East European countries. The present development of the Visegrád Group indicates that even within the European Union, further cooperation between these countries will

not be based on a search for common standpoints even though their individual interests may reflect the common needs of the Central European region as the whole. Despite all their internal problems and partial disagreements (which exist in other countries and regions as well!), Visegrád is a significant Central European phenomenon and its role in strengthening cross-border cooperation and the civic dimension is not negligible.

There is no doubt that room for cooperation exists in the area of education and educational research. This fact is one of the main motives behind the project Research Centres on Schooling. Within this project, a comparative study called *The Development and State of Educational Systems in Visegrád Countries in the Context of Social Transformation Processes* is being prepared. The project's goal is to broaden the theoretical basis of educational reforms by providing knowledge from a group of countries which is rather marginal in international research. While identifying and analysing convergent and divergent tendencies, the study aims to contribute to the clarification of the countries' specific features and national educational systems, in the European context as well as in the process of defining the strategies and priorities of educational policy. The identification of common problems will undoubtedly contribute to more vigorous communication and cooperation among Visegrád Group educationalists as well as broader international cooperation with this group.

The project is connected to the comparisons included in a Council of Europe project called *The Main Tendencies and Agents of Educational Policy and Reforms in Central Europe* which was completed in 1997.

In December 2006, the Institute for Research and Development of Education from the Faculty of Education of Charles University initiated an international colloquium which was held in Prague. Important experts, including the well-known comparativist, Professor Wolfgang Mitter, participated in the colloquium. As the result of the discussion, a common theoretical framework for national studies encompassing the essential dimensions of transformation, was agreed upon. The outline plan of such studies forms the first stage of the project. They aim to follow the process of changing requirements of school education in societies undergoing transformation. Furthermore, they focus on how these requirements influenced the structure of educational system, emphasised the way schools operated, the nature of the curriculum and the professional activities of teachers. They also focus on how these requirements were reflected in legislation and educational policy. Emphasis is placed on school education (ISCED 1, 2 and 3) with several overlaps with other levels. National case studies that are now being published in their first version reflect the view from "within" the given countries. They describe the development and current state of school education and are the subject of vigorous theoretical and methodological discussions which will culminate in an international workshop in October 2007. *Interpretation* presents the next stage of the project. At this stage, the legislation and activities influencing the development of school systems in individual Visegrád countries will be explained. The thinking behind them and their consequences will also be examined. In the third stage,

a *comparative analysis* across the given countries will be carried out identifying common as well as specific features of the transformation process and convergent as well as divergent tendencies in the given region. On the basis of this analysis, some relevant theoretical conclusions will be drawn. An international comparative study published in English will be the outcome of this project. It is expected that cooperation between project teams will be an asset on the international as well as the personal level. Regarding the fact that the comparative analyses will be carried out on the macro-level of educational systems, it is presumed that the results of this project will constitute a relevant basis for educational policy and for analyses at lower levels of educational systems and that they may contribute to micro-analyses in the school environment as well as to the process of self-evaluation in schools.

IN PURSUIT OF EDUCATIONAL CHANGE: THE TRANSFORMATION OF EDUCATION IN THE CZECH REPUBLIC

DAVID GREGER, ELIŠKA WALTEROVÁ

Abstract: *This study, using a common theoretical framework, analyses the process of educational change in the Czech Republic since the political changes in 1989. It starts with a brief introduction to the country and its educational system. Its main concern is focused on the phases and particular dimensions of the transformation process in school education at the primary and secondary level. Social and political incoherence, non-linearity, imbalances, atomization and diffusion as a consequence of tensions between continuity and discontinuity are identified as characteristic features of the process. In spite of positive shifts concerning educational policy, legislation, management, financing regulation, the curriculum, teacher professionalisation and support structure development, there are still barriers, e.g. lack of political consensus and the lack of a steering and monitoring mechanism in the educational sector. Real systemic reform reaching the intermediate and microlevels of the educational system has not been implemented yet.*

Key words: *social transition, Czech Republic, educational system, school education, educational policy, process of transformation, dimensions of transformation, systemic reform, education change*

Eighteen years have passed since 1989, when the Czech Republic underwent transition from a totalitarian political system and centrally planned, state-owned economy to democratic governance respecting human rights, the restoration of private ownership and a market economy. The changes also affected the education sector which, until then, was under the exclusive control of the central power. The present still shows some traces of the past. This is why we are concerned with the educational transformation process, its general analysis documented by examples from a different dimension of education. What are the phases of transformation that we can identify from its 18-year-lifespan? Which trends and directions can be traced in it? Who were the main agents leading the change? What are the significant changes in Czech education? These are the general questions related to the theory of transformation which we touch upon in this study.

More particularly we examine the present status of the Czech education system, using the common theoretical framework of transformation based on phases of deconstruction, partial stabilization, reconstruction and implementation. The selected ten dimensions of transformation are used to document the ongoing transformation process from 1989 to the present.

1. Historical Background to the Czech Republic and Basic Information

Historically the formation of the Czech state has its roots in the 10th century, but its full existence dates from 1212 till 1526. The highest level of development on the territory was reached during the reign of Charles IV (1346 - 1378), when a university, the first one in Central Europe, was established in Prague. From 1526 to 1918 the historical territory of the Czechs came under Habsburg rule. Strong action against the forces of reformation was taken between 1620 and 1781, when the Law of Tolerance was enacted. The Czech National Enlightenment started after this act. In this movement the Czech language and national education played a significant role. From the second half of the 18th century to the first half of the 20th century the Czech territory was an area where the processes of industrialization and urbanization took place. After World War I, in 1918 the Czechoslovak Republic was established. The formation of the state was a pragmatic political solution. However in the inter-war period, Czechoslovakia was one of the most developed countries in the world, while education was based on cultural tradition, humanistic ideals and national principles. The hopeful period was paralyzed by German occupation in 1938 when the Protectorate of Bohemia and Moravia was decreed and Slovakia became a separate state subordinated to Hitler's Germany. In 1945 the Czechoslovak Republic was renewed and equal rights in the economy and in the social and cultural sphere were confirmed. The Communist reversal in 1948 started the socialist period. International, cultural and political isolation and being tied in to the Soviet orbit lasted four decades. The short period of the „Prague Spring 1968“ was crudely and violently interrupted by the armies of the Warsaw Pact. The only result was the Proclamation on the Czechoslovak Federation. This federative order lasted till 1992. On 17 November 1989, when the quietly gathered students were attacked by police, the „Velvet Revolution“ started.

The process of social change represented a development similar to that of other countries in transition (see Průcha, Walterová, 1992), but the country was split into two independent states. The Czech Republic (further CR) has existed since 1st January 1993. Its surface area of 78,886 km² places the country among those that are relatively small. Prague, the capital, with a population of 1.3 million, is a unique treasure of cultural history and the centre of a rich cultural life. Prague and 13 regions create together the administrative units of the Czech Republic. The official language is Czech, a West slavic language. The currency unit is the Czech „koruna“ , CZK (1 euro is about 27.5 CZK). The CR is a parliamentary democracy with the President as the head of the state. The Parliament has two Chambers: the Chamber of Deputies (200 members elected for a four-year term) and the Senate (81 Senators elected for a six-year term). The present government (since 2006) is composed of a Coalition of the Czech Civic Democratic Party, the Christian Democratic Party and the Greens. The CR has 10.3 million inhabitants with a population density of 131/ km². Most inhabitants are of the Czech nationality, while other nationalities make up about 6%, including Slovak (3.1%), Polish (0.6%), German (0.5%) and Romany

(0.3%) minorities. The most serious concern is demographic development. Recent decades have seen a rapid drop in the birth rate and a decrease in mortality (life expectancy has increased to 74 years for men, 79 years for women), making the CR a country with one of the oldest populations in Europe. The proportion of the population of working age will decrease, and this will impact negatively on many areas of society, e.g. labour market, social and health care and services.

2. The Education System

The Czech education system provides education from pre-primary to tertiary level and accompanying services, extracurricular activities and school catering. **Pre-primary education** for children aged 3 to 6 is provided by kindergartens (*mateřská škola*) and is considered an important part of the school system. It is not compulsory, but most children attend it at the discretion of parents, and almost all five-year-olds. The last year of pre-school education is free. The Framework Educational Programme is developed centrally and every school then elaborates its own programme according to their own needs and conditions. **Compulsory education** lasts normally nine years from the age of 6 till 15, but 25% of children start school attendance later. The basic school (*základní škola*), with a single structure, provides the whole range of compulsory education in most cases, though in some villages only the primary stage. A small proportion of pupils is able to attend basic schools providing extended language teaching after third grade. About 10% of selected pupils leave basic schools after five or seven years for a 'gymnasium', and a small number of gifted pupils for a dance conservatoire, and finish their compulsory education there. Home schooling is a legal option for the primary stage of education. Pupils are assessed by marks (scale 1-5) or verbally. The drop-out rate in basic education is very low (lesser than 1%), while grade repetition is possible only once at one stage. Lower secondary education (the second stage of basic school) is provided by teachers specialising in particular subjects.

Upper secondary education is undertaken by nearly the whole age group after completion of basic education. The system is heavily differentiated according to content, duration and leaving examinations. There are following types of schools: **higher stage of secondary general school**, (*gymnazium*), lasting four years, completed by a secondary leaving examination (*maturitní zkouška*). This school prepares students mostly for higher education.

Technical secondary education has a deep tradition in the country. It usually takes place at the technical secondary school (*střední odborná škola*) lasting four years. The education contains general, technical and practical subjects and leads to the secondary leaving examination (*maturitní zkouška*) which allows entry to all types of higher education.

Vocational secondary education lasts mostly three or two years. An apprenticeship certificate (*výuční list*) facilitates transition into a qualified occupation. Some programmes are completed only by a final exam (*závěrečná zkouška*) and allow entry into an occupation which demands mostly manual work.

All upper secondary schools can offer **post-secondary education** in follow-up programmes (*nástavbové studium*) completed by a secondary school-leaving examination allowing its holders to enter tertiary education. **Performing arts education** takes places at conservatoires and prepares students in music, dance, singing and drama. The programme lasts six years.

Schools for pupils with special education needs exist from pre- primary to upper secondary education. The education is accommodated to students' needs and has the same value as education in mainstream schools. The progressive trend is to integrate pupils with special needs into the mainstream schools. Tertiary professional schools (*Vyšší odborné školy*) prepare students for demanding occupations not requiring a higher education degree. The *absolutorium* (professional examination – *odborná zkouška*) involves assessment in vocational subjects and foreign languages and the defence of a thesis. A certificate is awarded confirming the title of specialist with a diploma (DiS). Students are required to pay fees.

The secondary school-leaving examination (*maturitní zkouška*) from any type of school allows the students to apply for **higher education**. In the Czech Republic there are 20 public, 40 private and 2 state higher education institutions. In line with Bologna Declaration university programmes have been transformed in terms of a three-level structure: Bachelor's, Master's and Doctoral studies. There are exceptions in some fields (medicine, pharmacy, primary school teaching) providing extensive studies only at Master's level. Every study programme has to be accredited by the Accreditation Commission of MoEYS. The study provided by public and state higher education institutions in Czech is free of charge. Programmes in English and German, which are gradually expanding, charge tuition fees.

The Czech education system is centrally governed and monitored by the Ministry of Education, Youth and Sport (MoEYS) which is responsible for formulating the relevant educational policy documents and for framework educational programmes. MoEYS also allocates funds to regional authorities. Local municipalities are responsible for setting up pre-school education, basic schools and school facilities. Regional authorities set up secondary schools and tertiary professional schools. Private and denominational schools, set up by their founders, are represented mostly at the upper- secondary level. The quality of every school at levels 0-3 (ISCED) is controlled by the Czech School Inspectorate, independently of the state. Public schools are free. Private schools charge fees and receive their funding according to a special regulation. Denominational schools get subsidies directly from MoEYS. The funding of all schools is based on the per capita method. Citizens of EU member states can attend schools under the same conditions as Czech citizens. Minorities have the right to learn their languages in schools. Some schools provide teaching in minority languages. A few bilingual secondary general schools exist, mostly in large cities.

3. The Transformation of the Czech Education System from 1989 till 2007

The Czech Republic underwent in 1989 transition from a totalitarian political system and centrally planned, state-owned economy to democratic governance respecting human rights, the restoration of private ownership and a market economy. The changes also affected the education sector which, until then, was under the exclusive control of the central power. The transition thus started the large education transformation process that could be schematically divided into four phases.

The first, earliest, phase of the educational transformation lasted only few months just after the political turnover in 1989, and within our common theoretical framework it is called **deconstruction**. This early period is well recognized and documented in all societies in transition – Birzea (1996) labelled this early period *de-structuring* and Čerych et al. (2000) termed it as *a period of annulation or correction*.

The main aim of this period was immediately to redress the most visible shortcomings in education caused by the totalitarian regime. *De-ideologisation* of the legal documents, including curricula programmes, and *de-monopolisation* of state education, facilitating the setting up of private and denominational schools, and stipulating that parents and students should be free in their choice of an educational route and school, were among the most important tasks of this first stage of transformation. Rigid political and ideological control of the system was replaced by the broad school autonomy that Čerych (2000) characterized as “unusually large and unparalleled in many western European countries.” School autonomy concerns a wide range of competencies from curriculum determination to admission requirements and the content of examinations. Čerych (ibid.) argues that such school autonomy that represented a complete departure from the old system was the key factor in the bottom-up nature of the reform process in the first phases of educational transformation in the Czech Republic. Among other forms of direct action negating some features of the old education system built into the previous regime, we could mention abolition of the mandatory centrally prescribed number of pupils admitted to different types of schools, or allowing the teaching of other foreign languages than Russian, which was often the only foreign language taught.

However as pointed by Kotásek, Greger and Procházková (2004), some measures within the first wave of reforms had destructive effects (e.g. abolition of the institutional system for in-service teacher training or reducing the level of public pre-school education).

Other measures prompted the *restoration* of the traditional *gymnázia* (secondary grammar schools, called *multi-year gymnázia*) operating on the basis of early selection and segregation of children with high cultural capital (at the age of 11), but failed, among other things, to restore the status of teachers as state (public) employees with appropriate remuneration. In the first stage of transformation,

and even later, there was no doubt that most of the measures were necessary and fruitful. The trend of "*negating the past and restoring the 'status quo ante'*" was pursued – particularly in political and academic circles - with the lack of profound knowledge of West-European and global developments in education policies and without a constructive view of the long-term prospects of the development of democratic schooling.

The second phase (1991 – 2000) of educational transformation in the Czech Republic was labelled by Kotásek, Greger and Procházková (2004) **partial stabilization**. After the first most urgent and quickly made changes in education during the deconstruction phase, the partial stabilization period was characterized by the changes through gradual, partial legislative, organisational and pedagogical measures. The trend of retaining the "status quo" with a deliberate partial adaptation to new conditions was promoted, above all, by representatives of school administration and conservative teachers. This period was still mainly one of bottom-up reform, where the main changes and innovations were promoted by individual, institutional and local activities. Reforms were mainly spontaneous, arising from the pedagogical terrain and later based on operational, "*ad hoc*" measures. Partial stabilization is reflected at the legislative level by several amendments to the Education Act dating from the communist period. Among the key players in policy making at that time the role of private associations like NEMES, PAU and IDEA has to be mentioned. These agencies and other expert teams were preparing their proposals for the reform of Czech education where the state did not play yet the leading role in middle and long-term educational policy development. These proposals prompted discussion on the future of Czech education and the first programme for the reform of education entitled "Quality and Accountability" was prepared by MoEYS in 1994. Even though this report had no direct influence on education, it was the first attempt to formulate a comprehensive policy with a long-term perspective. Thus the second half of the 1990's could be perceived as a turning point in policy formulation, where the State, represented by MoEYS, started to play a steering role in the process.

Public opinion polls analyzing the demand for schooling from different stakeholders were conducted from 1995 till 1999 (for more see Kotásek, Greger, Procházková 2004; Walterová, Černý 2006). Knowledge of international and global trends in education was fostered by the active involvement of the Czech Republic in international large-scale studies of student achievement (e.g. TIMSS 1995, 1998; CivEd 1999; RLS 1995; PIRLS 2001; PISA 2000, 2003 – for summary of results see Straková 2003), and participation in other OECD projects, especially Reviews of national policies for education (in the Czech republic 1996, 1999). The other driving force of internationalization was the negotiations and preparations for EU accession at that time. This led to the preparation of the extensive strategic document *Czech Education & Europe* (1999).

Thus the second half of the 1990s was not only characterized by the partial adaptation and implementation of the changes required by the overall social transformation, but it was mainly the preparatory period for the next (third) phase

of transformation - **reconstruction**. Here it is obvious that the placing of the phases of transformation on the time line is a difficult endeavour, as there are no static lines and borders. Thus the other possibility is to consider the phase of partial stabilization only for the first half of 1990's and to consider the second half of the decade as already being the start of the reconstruction phase. The blurring of the borders between the different phases and their overlapping nature is even more obvious if we take into account different the dimension of education transformation (e.g. curriculum, monitoring and evaluation, structure of education system, as discussed below), where different developments did not reach the same stage at the same time. The discussions about the future of national education were, according to Kotásek (2005a,b), started in the second phase of transformation and they came to a head in the next reconstruction phase, when the White Book (MoEYS 2001), the Long-Term Plan for the Development of Education and the Education System in the Czech Republic, (MoEYS 2002) was prepared and approved by the government and later followed in 2004 by the new Educational Acts (Educational Act - The collection of Laws on Pre-school, Basic, Secondary, Tertiary Professional and Other Education No. 561/2004, and Collection of Laws on Pedagogical Staff No. 563/2004). According to Kotásek (ibid.) the last phase of transformation lasts from 2005 onwards and is the period of **implementation** of the systemic reform prepared in the previous reconstruction phase. This leads us to a conclusion similar to that of other Visegrád countries, namely that *systemic reform has not yet been achieved and thus the transformation process is still seen as an open-ended process*.

Analyses of the process of transformation have so far been rather static and sketchy. To clarify it more effectively, we shall point out some important obstacles to this schematic understanding of the lively process of change that started from spontaneous initiatives. Changes are still happening at the micro or intermediate level, even though the macro level seems to be now in its final phase, ready for implementation. What is more, the implementation process is not easy, especially for top-down reforms where it presents special difficulties. Critics of the reforms (most often articulating their concerns in the domain of curriculum and evaluation) argue that the reforms are not well prepared and, in particular, have not been explained and communicated to the wider public (parents and other stakeholders) and teachers are not ready to accept these reforms. Thus the process of implementation is long-term and there is a need for well developed support structures.

A detailed explanation of the educational transformation has also not been sufficiently elaborated within the context of national politics. The preparation of systemic reform was made during the long period when the Social Democrats held power (even though the government was a coalition with other parties) lasting from 1998 till 2006. After the last election the leading party in government became the conservative Civic Democratic Party, that has some other priorities and the reform that was prepared to be implemented is itself being reformed. Thus we might be observing the *reforms of reform*, or what Birzea (1996) calls a *counter-reform*. The most visible 'counter-reform' is in the field of evaluation (see below), where many measures prepared by the previous government and codified in law

have been postponed or are being gradually wound up. For understanding the process of educational transformation in the Czech Republic we shall thus analyze the *tension between continuity and discontinuity*, which is considered to be the main feature of transition (for example Birzea, Mitter). The current stage of development of education we could see as either an implementation phase that requires a lot of effort and time, or as a process of redefinition and reformulation of systemic reform. For both alternatives there are several obstacles to policy formulation or implementation, e.g. finances, management, but especially human resources. The risk of reforming the reforms over and over again is thus the biggest obstacle to any change. It might lead to disconnection of the macro from the micro level and thus prevent change taking place as it has been designed to do.

Educational transformation thus must be seen as an ongoing process, connecting the micro, intermediate and macro level. The process is more a spiral than a linear process. The question posed in our study, which is in line with other countries' reports, is: 'When do we reach the stage of systemic reform, and will we ever do so?'. In other words when will we have not just a plan for reform, but the reform itself, reform that will lead to a democratic, equitable, and quality education system for all citizens. The dilemma of implementation or re-reformation makes visible the importance of the setting clear goals for the transformation that must be shared or accepted among the policy makers and above all by political parties, teachers, parents and students.

4. Dimensions of Transformation

In the following paragraphs we are going to analyze the development of the Czech educational system and its current state by focusing on the most relevant problem areas, the dimensions of transformation.

4.1. Aims and Functions of Education

The fundamental principles concerning education have been included in the new Constitution of the Czech Republic (Constitution Act No. 1, 1993). The counterpart of the Act is the Charter of Human Rights and Freedoms. The right of education is ensured for all citizens of the Czech Republic and persons legally staying on the territory of the state. Public education at primary and secondary level has to be free. The state support of education, e. g. materials, methodical, information or psychological assistance is ensured under particular conditions. A key legislative framework has been created by the Education Acts. During the 1990s several amendments to the Education Act confirmed changes in the aims and functions of education reflecting broader societal context.

The impact of democratization and deideologization in society, the liberalization of the economy and political plurality have influenced discussion on the functions and aims of education. The main aim of education in the former Czechoslovakia, managed under a single central political and ideological leadership, was focused

on preparing children and young people for life and work in a „developed socialist society“ and on preparing them „for the defense of the socialist homeland“. Dramatic political discussions concerning education during the 1990s oscillated between neoliberal and social state positions, preferring individual or social values of education. The broader, consensual, framework for the functions and general aims of education is reflected in the White Book (2001). The starting point of educational aims has been „*the human as a person and his relation to society and the natural order*“ (White Book 2001, p. 13). Education is a fundamental and universal human value. The aims and functions of education are derived from both individual and social needs.

Contributing parties to education are the family and social institutions (schools and other institutions) as well as citizen groups. These parties influence the social aims and functions of education in certain phases of the human life cycle.

The educational system has to focus on the following aims (White Book 2001, p. 14–15):

- to develop human individuality by an approach that recognises the importance of cognitive, psychomotoric and affective cultivation
- to transfer the culture in historic continuity, develop the national identity and to protect cultural heritage
- to protect the living environment and the sustainable development of society
- to support the cohesion of society
- to educate for partnerships, cooperation and solidarity in European and global society
- to increase economic competitiveness, social prosperity and employability.

Generally formulated educational aims are transformed and made concrete in legislative and programme documents concerning particular levels of the educational system (Education Acts, Framework and School Education Programmes ... etc.).

The functions of contemporary Czech schooling reflects dynamic change in social demands, a dramatic development of knowledge and technologies, economic competition, increasing social differences, changes in social models (particularly the family), ecological distress etc. The importance of the ethical, protective, ecological, diagnostic and methodological functions of schooling has increased alongside traditional processes of socialization, aculturation and professionalisation. Economic and political functions are interpreted in a new way stressing effectiveness and equity in education.

4.2. Educational Management and Administration

The state regulation of the education system has been reshaped in accordance with overall changes in the central role of the state in the management of public affairs. The process of building a new mechanism for an effective state role in managing a decentralized system of educational administration has entailed the

erosion of the authoritative position of the political centre.

Until 2000 school management was separated from the overall system of public administration. It was a particular system of administration managed by the Ministry of Education. The reform of public administration introduced a principle of self-regulation. This changed the system of educational management and the nature of the state's steering role in the whole process radically. The current framework was established by the Act on Public Administration and Self-regulation (*Act No 132/2000*). The act devolved responsibility for education and school management to lower levels of administration.

The key role of the centre now is to coordinate, regulate and distribute funds within its position as the possessor of overall budgetary control. The preference for understanding the state's task in terms of overall conceptual, legislative, monitoring and steering activities allows it to abandon a huge number of its precious duties where operational details had to be determined from the centre. Its central organ, the Ministry of Education, Youth and Sport, is responsible for a rather broad area of public affairs. Concerning school education, the main task of the Ministry has been to develop long-term and medium-term Programmes of Educational Development for particular sectors of education, to monitor and improve the school network, to monitor the results of evaluation from different levels of the educational system and results of the Czech school inspectorate which is an independent institution.

The Ministry ensures the share of finances for education in the national budget and formulates standards for the distribution of them. The important role of the Ministry has to lie in the whole of human resources development policy and in cooperation with other sectors (particularly social and labor affairs, health and some economic sectors). Communication with the public, media and representatives of civic society (parents, church, teacher associations, academic community and others) is an important task of the centre. Unfortunately, cooperation and communication with partners has become rather fragmented. This is because a regular steering consultative organ, such as the National Council for Education (planned in the White Book), does not yet exist. The temporary Consultative Council for Educational Policy, functioning in the period 1998 - 2000, when the national strategy of educational development was formulated, ceased to operate after the White Book was improved by the Czech Government. Since 2004 the Ministry has started to apply Framework programmes supported by the European Social Fund after the Czech Republic's entry to the European Union. The Ministry is responsible for operational programmes concerning education and research, for project selection and management, and also for the distribution of finances to project holders.

Concerning decentralization, the lower levels of management and administration have increased their responsibilities and rights in decisions on education. Regional representatives have full responsibility for the formulation, realization and evaluation of educational policy in particular regions. Regional offices, together with school departments, prepare long-term plans for regional educational development, elaborate annual reports (every two years), manage regional school budgets and administer the distribution of public finances. Analyses of

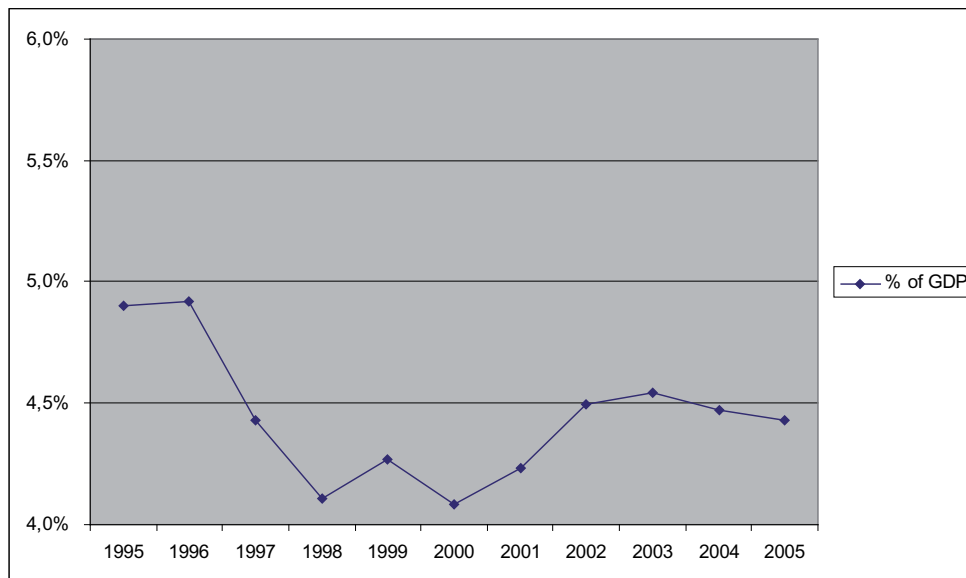
school capacities, educational opportunities, school network development and school accessibility, evaluation of the quality of schooling and staff development, and also the insertion of school leavers into the labour market are among the duties of regional offices, demanding their attention and responsibility. Regional authorities set up secondary public schools and tertiary professional schools, and are responsible for providing the accompanying school facilities. Private and denominational schools, represented mostly at the upper secondary level, are also under regional supervision. Local municipalities are responsible for setting up nurseries, basic schools and the accompanying school facilities necessary at local level.

The process of decentralization has required the development of indirect instruments of educational administration and a new mechanism different from the previous one which emphasised the role of national authorities and central control. The strengthening of responsibilities and decision making at lower levels has caused difficulties and controversy. These relate to performance levels of the new mechanism and the diversified roles of educational management at certain levels. To rationalize the activities of the Ministry as a central institution means according new roles which demand restructuring of the office and requalification for officers. New qualifications are also demanded by regional management and administration which face changing conditions, new demands and professional competences. This was the reason for the extensive development of study programmes and courses of school management. Currently discussion on the reinforcement of regional responsibilities in educational management has continued and relations and communication with the centre are at the centre of attention of regional representatives.

4.3. Financing the School System

Financing educational systems is one of the important dimensions to be tackled when describing educational transformation. The total public expenditure on education relative to GDP in the Czech Republic was in 1995 – 4.8% of GDP; in 2000 – 3.8% of GDP and in 2003 – 4.3% of GDP (OECD 2006). Public expenditure on education gradually rose after 1989 and reached its peak in 1995. 1994 and 1995 are viewed as a period of high economic growth in the Czech Republic, but following the exchange rate crisis in May 1997, the “government packages” in spring 1997, which were aimed at maintaining the balanced government budget and thus introducing radical budget cuts, had negative effects on the educational budget as well. The Governmental long-term strategic document – White Book (2001) - sets the aim of raising public expenditure on education to 6% of GDP. Even though we could observe (see Figure 1) a positive trend of rising expenditure following 2001, the target of 6% of GDP is still beyond our present reach. What is more, we have not yet reached even the level of the middle 1990s.

Figure 1. The total public expenditure on education relative to GDP in the in the Czech Republic from 1995 till 2005



Source: ÚIV: Vývojová ročenka školství 1995/1996 - 2004/2005

Public expenditure on education is just one macro level indicator of the relative importance and priority devoted to education according to international benchmarks. But for the understanding of educational transformation it is important to have a look especially at the reforms of financing that have taken place since 1989. The most striking change appeared during the very early phase of transformation in 1992 when **per capita funding** (so-called normative financing) was introduced. Until 1991 index financing of institutions was used, mainly based on the size of the budget used by a school in previous years, without taking into account any performance criteria. Per capita funding was introduced as a form of performance financing, in that the number of students was taken to be a main indicator for the financing the schools. The introduction of normative financing has led to competition among schools aiming to attract as many students as possible. This is the so-called "fight for the student" which is even more intense because of the demographic fall in the relevant population cohorts. The new system of financing was received favourably because it supported the demand-sensitive nature of the educational system and made the voices of parents and students more powerful.

There is one more principle used for allocating funds to schools that is not based on per-capita financing. A huge volume of funds is administered separately and earmarked for innovation and development programmes. These funds are targeted to stimulate initiatives taken by those schools which sign up for state-run programmes, and which will themselves define the specific innovation program. The aim is to help schools tap their creative potential and focus their activities on

new aims. The establishment of such innovation and development programmes represents a key instrument of indirect management of education and facilitates the implementation of processes perceived as necessary by central government for the educational development and desirable change. In largely decentralized systems this is an effective way of pursuing reforms from above. In the current situation many such innovations are financed from European Union structural funds.

4.4. Changes in the Structure of the Education System

The current shape of the educational system was briefly described in chapter 2 in this paper (a more detailed description can be found on the 'Eurybase' site, see *The Education System in the Czech Republic 2005/2006*). Our aim in this section is not to give a detailed description of all types of institution, but rather to choose the most striking examples of structural reforms and changes that will add another stone into the overall mosaic of the transformation process.

The structural reforms are the most visible changes. They could be undertaken as comprehensive and holistic reforms of the whole educational structure (as is probably the case with Poland), or they might be represented by rather moderate changes (prolonging the length of compulsory education or at some particular levels of education, e.g. prolonging primary education from 4 to 5 years and extending the length of basic school from 8 to 9 years, as happened in the Czech republic). These reforms are most visible in the case of the creation and development of new types of educational institutions. In the development of the Czech Republic this is the case especially for multi-year gymnázia and tertiary professional schools.

The **multi-year gymnázia** (these are multi-year general secondary schools with an academic orientation, lasting 8 or 6 years in most cases, combining both lower and upper secondary education) which had operated in Czechoslovakia until 1948, were re-established by a 1990 amendment to the Education Act. Restoration of the multi-year gymnázia is the most striking example of the trend of *negating the past and restoring the 'status quo ante'* that was widely used during the deconstruction phase. During the communist period only 4-year gymnasia existed (upper secondary general education) and all children aged 6 to 14 were educated in the comprehensive (common or single-structure) school (*jednotná základní škola*) comprising primary and lower secondary education. The basic single-structure school was established in 1948 after the communists came into power and replaced the existing school structure which had parallel and separate branches of study for pupils aged 11 to 14 years. The pre-communist system had been widely criticized already since the 1920s from the perspective of social justice and equality of educational opportunity.

Nevertheless, the main characteristic of socialist education in the basic school was a unified curriculum and progress through it in the same pace for all pupils, the emphasis being on sameness and mediocrity. After experiencing the single-structure school during 40 years of "real socialism" in Czechoslovakia, highly

educated parents and representatives of elites did not believe in the ability of this common single-structure school to respect individual students' different learning styles, interests, personal traits and other individual differences.

As a result of that disappointment with the single-structure (common) school they required the restoration of segregation at an early age, even though this was not in line with global educational perspectives and developments in western countries as they had developed from the 1950s with the quest for comprehensive schooling. The aim in establishing the multi-year *gymnázia* was to provide a more demanding education, facilitating further academic studies, for students as young as 11 who showed a higher level of cognitive capacity. The establishing of the multi-year *gymnázia* is thus the result of social pressure and the strongly articulated demand of more educated parents. (For more detailed discussion of the development of comprehensive schooling and the restoration of multi-year *gymnasia*, see Greger 2005).

Admission to six- and eight-year *gymnázia* programmes is based on selection consisting of various types of written and oral examinations designed by *gymnázia* teachers (normally in the mother tongue and mathematics), and, sometimes, intelligence or student aptitude tests provided by private companies. The decision concerning admission, on the basis of examination results as the main criterion, is taken by the *gymnázia* principal who is also a civil servant. The intake numbers are determined by the school administration (approximately 10% of the relevant age group) and range from 6 to 14% depending on the region. The national average in 2005/06 was 9.8%. The number of applicants for six- and eight-year *gymnázia* programmes is double the intake number.

The restoration of early selection during the compulsory education was widely criticized by researchers as well as pointed out by OECD experts. The government-promoted White Paper of 2001 reiterated that the two streams (selective *gymnázia* and the 2nd stage of basic school) of education should be gradually merged and that internal differentiation should take place within basic school. The inclusion of this recommendation in the new education bill, in the form of the gradual abolition of the lower years of six- and eight-year *gymnasia*, prompted public debate which was dominated by the requirement, on the part of parents with higher levels of education and socio-economic status, that a more demanding level of education be retained for their children.

The pressure exerted by the parents, *gymnázia* directors and teachers and academics in the media, not to mention their political influence, prevented the proposed reform and was one of the reasons the Bill was rejected by the Parliament as a whole in 2001. The new Education Act from 2004 at least introduced only one national curricular document for the two parallel types of lower secondary education – the Framework Educational Programme for Basic Education - which is the foundation for the development of school educational programmes at both basic schools and at six- and eight-year *gymnázia*. Moreover, the number of teaching periods at basic school should gradually increase so as to be equal to *gymnázia* in quantitative terms and the levels of salaries of teachers at both types of school

have been made identical. However, the “*numerus clausus*” is preserved ($\pm 10\%$ of 11-year-olds) as well as the selective admission proceedings for six- and eight-year *gymnázia*, which discriminates against children with lower cultural capital – as the results of the PISA survey in the Czech Republic have revealed (see more in part 4.10. below).

The second newly established institutions to be mentioned here are the **tertiary professional schools**. The tertiary professional schools have been established since the 1992/93 school year as a completely new type of post-secondary education that did not exist in the past in the Czech Republic. They were implemented as an experiment from 1991 till 1995, when the amendment to the Education Act recognized them officially as a part of the regular education system. These schools were mainly founded as secondary vocational schools. However, later on many of them were transformed into (or some were newly founded as) legislatively independent institutions. Few of these schools managed to successfully transform themselves, after appropriate accreditation, into non-university types of higher education institutions offering bachelor degrees.

These schools contributed to the diversification of post-secondary education, even though they were (and to a large degree they are still) considered by the public as a “lower category” compared to higher education. After more than a decade of their official establishment, they are being more and more recognized by the labour market and by the general public as institutions fulfilling their purpose of developing and broadening the knowledge and skills of a student acquired during secondary education. They provide general and vocational education as well as vocational training for working in demanding occupations.

There were 174 tertiary professional schools in the Czech Republic (114 state schools, 48 private and 12 denominational schools) in the school year 2006/2007 offering programmes leading to the award of specialist diplomas in fields such as health services, agriculture, business, engineering and tourism. Access to tertiary professional school is open to all students that have graduated from upper secondary education by completing the school-leaving examination, the so-called *maturitní zkouška*. The length of studies for those in full-time attendance was unified by the new Education Act from 2004 to 3-year-long programmes, and for the medical programmes 3.5-years. Furthermore, following the new Education Act the Accreditation Commission that serves as a consultative body to the Ministry, was newly established to help in the process of approving educational programmes approvals (using a similar approval scheme to that applying to the approval of HE programmes).

The current development is leading to a convergence of professional technical schools and higher education institution of a non-university type. The White Book for Tertiary Education that is now being prepared suggests this trend. However, bearing in mind the large number of these schools, the authors suggest that those who will not transform into HE institution could become the centres of post-secondary (but not tertiary) further education playing an important role in their regions and complying with the demands of the local labour market.

To sum up: The re-creation of multi-year gymnázia represents a model example for the deconstruction phase, through its negating the past and restoring the 'status quo ante' trend. They were established in this early phase, without the knowledge of western trends and without elaborated argumentation. However, they demonstrate the fact that many rapid changes made in this deconstruction phase are hard to reverse afterwards. The example of professional tertiary schools teaches us that introducing a new institution into the system requires time before the public, and other institutions which are already a part of the system, come to accept it. This makes us aware of the fact that to introduce a new institution and to reach the planned goals represents a long-term process that has not, in the case of tertiary-professional schools in the Czech Republic, yet been achieved. The deeper structural reform at the primary, lower and upper secondary level was not planned. The largest changes made so far have briefly been described in this section.

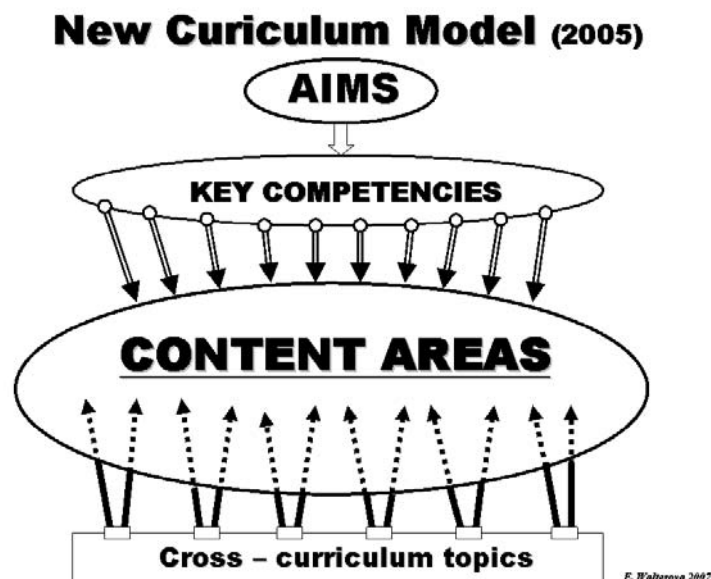
4.5. Curriculum Policy and Development

The traditional curricular model of Czech schools was founded on the transmission of cultural experiences, national values and patterns of behavior usual in the domestic social environment. Centrally developed time plans and uniform syllabi were implemented compulsorily in every school. Teachers mostly played the part of transmitters, while the implementation of the unified curriculum was controlled by the schools inspectorate. Only one set of textbooks for every subject was introduced for student use.

Changes in curriculum policy and development started in very early phase of the transformation process. First of all the expulsion of ideological distortion was achieved, while, a greater freedom of choice in teaching methods and textbooks, together with alternative approaches, have paved the way for a more relaxed attitude towards the curriculum and towards curricular school autonomy. In the mid 1990s the requirement of the State for education at basic and secondary schools was defined within a broader framework by **Educational Standards**. These were the main instruments of state curricular policy, setting out its requirements for the quality of education. The documents outlining educational standards for a relevant level of education consisted of a definition of achievement targets, providing a general outline of content and of the performance skills and outcomes the students should gain. Model programmes for schools were offered, eg. **General School, National School, Basic School**. Schools made modest adjustments to a selected model programme depending on their particular circumstances. For any alternative pedagogical approaches the approval of the state was demanded. An overwhelming majority of schools remained compatible with the traditional curricular model, not having taken into account changes in the educational environment and of the need for innovative teaching focused on the active personal development of students equipped with a set of universally applicable life skills necessary for the present and future. In spite of the changed content of traditional teaching subjects (i.e. a change in the way the previous curriculum model was constructed),

the curricular model drew criticism. The whole curriculum was overloaded, too encyclopedic and academic. The newly developed present curricular programmes apply a substantially changed model (see the illustration below), based on quite different principles to those of previous syllabi and teaching plans. New curricular programmes have been ready for implementation in basic education since the school year 2007/8, while programmes for secondary schools are in the phase of pilot verification.

Let's give a general outline of the new curriculum for basic education (2005). **Its aims are oriented towards the development of key competencies.** Particular attention is given to * strategies of learning and motivation towards lifelong education, to creative thinking and problem solving, to * communicative competencies in mother and foreign languages*, to the development of cooperative strategies and to respect for others. Attention is given to the * development of a free and responsible personality aware of its right and duties *, to emotional development and to positive attitudes, behavior and relations with other people, the environment and nature. * Stress is laid upon the active and responsible protection of physical, mental and social health, * support of tolerance, politeness towards other people, their cultures and values, and learning to live together. *The development of self-awareness, including awareness of one's own abilities and opportunities, the application of these abilities (together with knowledge and skills) in solving problems in one's own life and professional orientation, are important.



Education **content is organized into broader areas**, integrating traditional teaching subjects and giving orientation to human development and to actual life demands. These areas can be listed as follows: * Language and communication

(Czech language and literature, Foreign languages) * Mathematics and its applications * Information and communication technology * Human beings and their world (primary introduction) * People and society (History, Civics) * The Human and Natural Worlds (Physics, Chemistry, Natural Science, Geography) * Arts and Culture (Music, Fine Arts) * Human health (Health Education, Physical Education) * The world of work. Current problems in the present world are emphasised as cross-curricular topics binding content and supporting the development of key competencies. Six cross-curricular topics are stated: * Personal and social education * Education of a democratic citizen * Multicultural education * Environmental education * Media Studies * Education for coherent thinking in European and global dimensions.

A two-level participative curricular policy is now in use. Frame curricular programmes are developed on a national level. Every school prepares its own School educational programmes which are completed by student assessment programmes and evaluation instruments.

Undoubtedly, teachers are considered crucial implementors of the new curricular model. The implementation itself is a complicated and complex process changing curricula, school culture and teacher training. School in general is a specific culture reflecting changes slowly and understanding its mandate traditionally in terms of the passing on of knowledge from teacher to student. Written curricula can be changed by experts but real change depends on teachers. However teachers, the main actors in the change process, have not been appropriately prepared for new tasks.

Changes in curricular policy demand team working and the support of schools by social partners. Real educational change requires effort over time against the resistance of inertia in terms of current practices and ways of behaviour and thinking. Extensive learning from others and network building has been important, as well as internal changes to the school climate and organization, building an ethos supporting opportunities to learn for every pupil and student.

4.6. Evaluation and Monitoring of Education

The complex system of evaluation is a key area for the functioning of a decentralized education system. It includes evaluation at different levels – student assessment, evaluation of schools and evaluation of regions and the educational system as a whole. Especially in the transformation of education, the importance of evaluation gradually rose in importance. In the early years of the transformation process schools were granted a high degree of autonomy in a wide range of competencies, including curriculum determination. As the White Book approved in 2001 argues, “a higher degree of school autonomy, which means that a school is held responsible for its teaching, needs to be balanced by a systematic evaluation of achievements to ensure the quality and effectiveness of its work” (MoEYS 2001, p. 41). Until the White Book’s publication in 2001 no coherent system of evaluation and monitoring had been proposed, even though these issues had already been

discussed during the early years of transformation.

Following the political changes of 1989, many new forms of evaluation have been introduced. This is particularly the case with the concept of school **self-evaluation**. The 1995 amendment to the Education Act obliged all schools to produce and publish an annual report, which served as an internal evaluation document that was not only to be monitored by the educational authorities, but also was to be made available to parents and pupils. The same amendment obliged the Ministry of Education to compile an annual report on the whole education system and submit it to the Government. According to the new Education Act of 2004, annual reports were to be drawn up by the Ministry of Education (state level), by the regional authorities (local level) and by the head teachers of basic, secondary and tertiary professional schools (school level).

The self-evaluations of schools that are the basis for annual school reports are to be used by the **Czech school inspectorate** for their monitoring activities at schools. The Czech school inspectorate represents the traditional institution for external evaluation of schools in the Czech Republic. It has its roots in the 19th century Austrian education system, with its uniform system of state supervision over schools. However the School Inspectorate underwent fundamental changes in the early years of transformation, which reset its function and goals and particularly its working methods.

Another form of external assessment is represented by private institutions that offer external tests to schools on a commercial basis. These private companies are of growing importance and many schools use their services to be able to compare the results of their school with other schools. These companies responded to school demands for external evaluation, since the state did not supply this service and there was no national testing at any level of education.

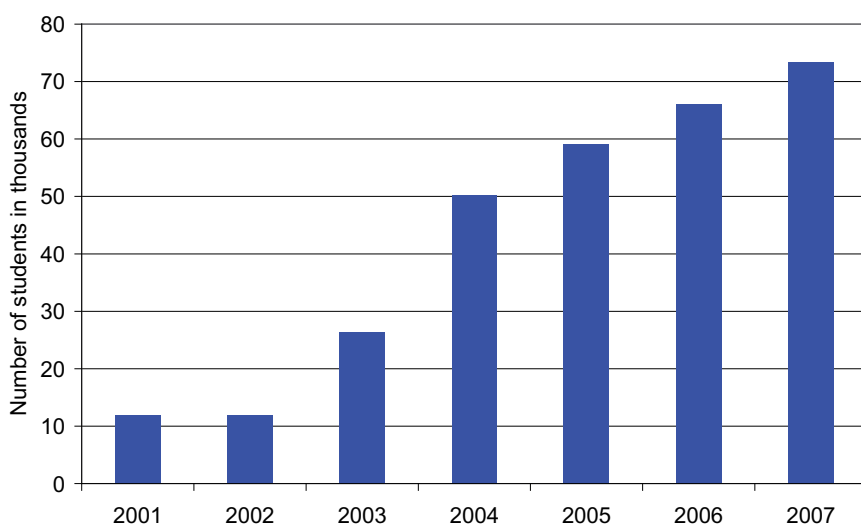
This has changed with the establishment of the **Centre for the Evaluation of Educational Achievements** (CERMAT), which from January 2006 became an organisational unit of the state (even though it was founded in 1999 as part of the Institute for Information on Education). It was made responsible for the preparation of reform of the **school-leaving examination at the end of upper secondary schooling**, the so-called "*maturitní zkouška*". The new leaving examination proposed in the White Book was also included in the new Education Act. The new leaving examination is legally required to consist of a general part and a so-called 'profile' part. The general part of a school leaving examination consists of three examinations: the Czech language, a foreign language and an optional subject chosen by the student (mathematics, civic education, natural and technical education or information-technology). Mathematics was included only as an optional, not obligatory subject for the leaving examination. This has been the subject of widespread discussion.

The 'profile' part of a school-leaving examination consists of three compulsory examinations, where the principals specify the selection of subjects of compulsory examinations in compliance with the Framework Educational Programme.

The new form of *maturitní zkouška* was to be introduced, according to the

Education Act, in 2008, but the new government has proposed an amendment that has passed through Parliament that postpones the start till 2010, arguing that it is not yet well prepared. However, the national tests prepared for the secondary school-leaving examination have been at the pilot stage for a long time, (since 2001) and schools could join these pilots on a voluntary basis. The next graph shows the participation of students in the pilots that reached its peak in 2007 when more than 70 000 students took part.

Figure 2. Number of students participating in pilot programme for secondary school leaving-examination (Maturita nanečisto)



Source: Chvál, 2007, p. 2

The Centre for the Evaluation of Educational Achievements has implemented another two important projects that are in line with a systemic complex evaluation system proposed in the White Book. This concerns the **external assessments of students in 5th and 9th grades** (at the end of primary and lower secondary education). These initiatives were put into practice as projects from 2004 till 2007 and were funded by European Structural Funds. The projects consisted of three tests: Mathematics, the Czech language and a student aptitude test supplemented by the a student questionnaire. Also these projects were open to interested schools on a voluntary basis, and in 2007 already almost 60,000 students in 5th and 9th grades were taking part. The idea of the authors of the White Book was that these projects could result in national examinations following confirmation of their full implementation. However these were proposals of the previous Social Democrat government in power. When the new government, led by the conservative Civic National Party, came to power, the plans went no further. This is another example of systemic reform being gradually implemented (so we have entered the implementation

phase) and then stopped after a change of government. Even though it is now unclear whether the new leaving examination from upper secondary schooling will be in place by the postponed date of 2010, some argue that it is just a way of putting a stop to a process that has been under preparation for more than 10 years. The introduction of national testing in the 5th and 9th grades, as well as the new form of leaving-examination with a new component of the nationally comparable results, also conflicts with the vested interests of the private agencies that provide external evaluation on a commercial basis. If the state supplies testing in this area it may well harm their business. However, both activities represent a change from an approach based on controlling the input of pupils and their achievements through entrance examinations to a more desirable approach stressing the control of outputs. This has been the main and as yet unrealised idea in debates since the early 90s.

4.7. School Autonomy

Changes in the statutes concerning schools, formerly state institutions, have been gradual. External school autonomy developed step-by-step from the early 1990`s until the Education Act (2004). The Act approved a whole complex of instruments for the autonomous functioning of schools as public institutions. The first changes started at once in 1990. The amendment to the School Law identified schools as public institutions, allowing for the establishment of private and denominational schools under state control. By the same law the pedagogical autonomy of teachers in choosing teaching methods and approaches was improved. Further changes concerned textbooks, which may be chosen by schools from the list approved by the Ministry of Education.

Rather broad competencies and responsibilities were given to principals who had the right to select school staff and to set the school budget on the basis of expenditure limits set by a general directive. In the mid-1990s a new amendment to the Law allowed for the establishment of school councils consisting of representatives of teachers, students, parents and local communities. Also schools were offered autonomy in a legal sense (juridical sovereignty). Strengthening school autonomy was a crucial counterpart to public discussion during the development of a strategy for national education policy in the Czech Republic (1998 - 2000) before the White Book was published (2001). Finding the balance between the freedoms and responsibilities of schools as open institutions diverted attention also to quality control, self-evaluation and the system of regular instruments implementing school autonomy. Some of them were put into practice through initiatives of individual schools, while others were made compulsory by the School Act (2004). The long-term Programme of School Development is a basic document for the management of school transformation, for developing school educational programmes, for staff development and internal evaluation of school quality. The programme has to be a criterion for external evaluation and school inspection. Principals are responsible for the programme, but it can't be developed without

staff participation. The school council, now a compulsory organ in every school, approves the programme. The Annual School Report, another instrument of school autonomy as a public document, informs all school partners about school results. The third basic instrument of school autonomy is a School Education Programme developed by teaching staff according to a common national framework. The development of school education programmes is part of curriculum reform (see above in part 4.5.). A substantial contribution to school autonomy has to come from self-evaluation. The development and implementation of its instruments are the most difficult problem to be solved by schools. It is expected that help from research and development institutions will be necessary.

In the Czech case, a gradual increase in school autonomy was initiated from below, particularly by alert schools and independent professional groups. Further development demanded legislative regulation. The present implementation process requires external support and a common infrastructure for the work of school teams and individual teachers, consulting and networking at all levels of the school change management.

4.8. The Teaching Profession and Educational Staff

The social status of teachers at the beginning of the 1990s was rather low. Correspondingly their salaries underestimated the complexity and burdens of this demanding profession. To improve the social status of the profession by increasing the level of teacher salaries was formulated as a main goal of educational policy in the 1990s. The effort to do so, joined with the process of shaping a stronger socio-professional group supported by teacher trade unions, teacher initiatives and newly-established teacher associations, was quite successful. During the 1990s teacher salaries gradually increased and nowadays are above the average salary in the public sector. Basic teacher salaries are determined by the state, but may be supplemented from an additional pot in the hands of principals. Teachers in Czech schools are not civil servants but public employees employed by schools. The prestige of the teaching profession, according to recent ratings, follows that of medical doctors, lawyers and other professions based on higher education qualifications.

Teachers are considered key actors in the process of change in schools, participating actively and directly in the process of educational reform, with increasing autonomy and personal responsibility which demands improvement in the professional qualities and competencies of educational staff. According the new Act on Education Staff (Act No. 563/2004) qualification demands, requirements and professional competencies are strongly defined by law for every category of educational staff at every level of schooling (ISCED 0-3). Obligatory general and specific preconditions for fulfilling responsibilities within educational professions are prescribed by the Act. The system of career progression, which is linked to salary progression, allows an individual career to advance according to a particular specialisation (function). The system introduces a number of diversified categories

for teachers, such as educational advisor, head of a methodological commission, or specialist in the development of school educational programmes. It continues with other categories of management staff, starting with school heads and defining the criteria for their qualifications. It is expected to motivate teachers and other educational staff to work on their professional and personal development and develop the quality of the whole school as well.

Prescribed qualifications are ensured by the system of initial teacher education and in-service training, which offers various educational tracks towards qualification. Recently the structure of teacher education has changed according to the Bologna Declaration. The integrative model of study has been replaced by a two-level (consecutive) one. Primary and secondary teachers have to reach Masters degree level in teacher training programmes of various fields. Bachelor study programmes are assigned to pre-school teachers, teachers of practical subjects and other educational professions. Initial teacher training is carried out by nine faculties of education and other relevant university faculties. The study programmes are carefully evaluated by the Accreditation Commission. A common standard has not existed in the past because of the need to respect the autonomy of higher education institutions. However, every teacher study programme respects a common framework created by sharing key components and credits with a generally acknowledged validity: they comprise a general university foundation, a pedagogical-psychological component, a subject specific component, a teaching-related (didactic) component and teaching practice. The pedagogical-psychological component is required for 20 - 25% of credits, while teaching practice should represent at least 10 - 12% of the time schedule. The specifics of teacher education, particularly the development of socio-personal qualities and professional abilities replacing a traditional academic orientation, has been permanently under discussion and is reflected in various innovations in teaching studies. The development of in-service training and teaching staff, and self-education during productive professional life, have been significant demands made during the transformation process. Difficulties in the 1990s, after the deconstruction of the previous centrally controlled system based on activities of central institutes and regional pedagogical centres, were linked to the rather slow building up of new infrastructure and a lack of properly prepared trainers. Independent initiatives and groups of innovative teachers, together with some university departments, partly filled the gap between the destroyed former system and the still inchoate formation of a new one. However these concerned only a small proportion of all teachers and schools.

The present broad development of in-service training, initiated by the new legislation, is based on a pluralistic and more flexible structure of institutions which receive direction from the commission of the Ministry accrediting the training programmes. Universities, teacher associations, schools and other agencies, including private ones, develop the programmes. Two Institutes (for general and for vocational education) of the MoEYS, together with the newly-established Institute for Pedagogical Staff Development, play a mostly supportive role in network building and human resources development. Universities, and particularly faculties

of education, are centres linked with additional and in-service training of newly defined categories of qualifications and of the professional careers of educational staff (e.g. head teachers, school managers, experts in teaching methods, pedagogical advisors). Teacher initiatives and schools organise mainly courses and workshops focused on teaching innovations and curricular-specific topics.

The growing number of students, teachers and other education staff participating in initial education and in-service training has increased demands on the provision of study in addition to the usual full-time studies. New forms of study include *distance* or *combined* study, and the recently introduced intensive *e-learning*. Extension of the network of distance education and e-learning study programmes broaden opportunities to access teacher qualifications and facilitate ways to improve qualifications without any interruption of employment. The new forms of studies are demanded also for more attentive perception of the particular and individual needs of students. Creating the conditions for a well-organized establishment needs technical and personal capacities, good quality study materials and learning support, new instruments for evaluation etc. New forms of studies are in progress in the Czech Republic where special projects are being introduced substantially supported by European Funds.

4.9. Support Structures

During the 1990s support structures in the educational sector were not a priority of educational policy and systematic attention to them was absent. Due to the liberal position of the state in this matter various providers attempted to implement a scale of supportive activities for schools without a common strategic framework or consistency. Among them the support provided by private companies and agencies addressed to individual schools or localities was the option that prevailed. Since the early 1990's high levels of support have come from abroad through various bilateral, regional, institutional or group forms of cooperation, eg. introducing new types of study programmes for school managers, delivering textbooks and lecturers for foreign languages teaching or developing evaluation instruments through independent groups or private agencies. Domestic initiatives serving to support the work of schools and teachers were fragmented at this time and dependent on various financial resources and the skills of different participants, producing inconsistent and unbalanced effects.

The absence of intentionally established support structures started to be evident in the mid-1990s, but the formation of a regular support mechanism started later when the role of stakeholders and social partners in education was stressed. Remarkable incentives emerged through the PHARE programme and its projects concerning the reconstruction of the educational system (PHARE RES), the reform of vocational education and training (PHARE VET), information system development (Access to Documents) and particularly through the project aimed at a pre-accession strategy for human resources development (Czech Education and Europe 1999). Functioning mechanisms and effective instruments for the support

structures should be multifaceted and created by public, private and NGO agents. At present on the national level institutions have been appointed to support the following areas:

- **Information system development:** The Institute for Information in Education (ÚIV) provides annual statistical surveys in the domestic school system, serves as a national office of 'Eurydice', provides information on school networks and the efficiency of the school system.
- **Curriculum development:** The Educational Research Institute (VÚP) develops curricular framework programmes for primary and secondary general education, monitors the implementation of the framework in pilot schools, gives a methodology of implementation and supports a network of information exchange and a discussion forum of schools on the web. The National Institute of Vocational Education (NÚOV) develops framework programmes for technical and vocational secondary education, monitors the network of vocational schools and provides research on the implementation of framework programmes in schools.
- **Human resources development by education:** The National Education Foundation (NVF) monitors the development of professional education and its relations with the labour market and supervises the programme of human resources development. The National Agency for European Educational Programmes (NAEP) is a centre for international services for schools and students and the office managing EU educational programmes and supporting the development of European school networks.
- **Evaluation and assessment:** National Centre for Educational Evaluation (CERMAT) develops assessment instruments and tests for secondary leaving examinations and intends to develop instruments for evaluation and selfevaluation of basic and secondary schools.
- **Work of teachers and professional development:** The network of in-service training institutions is supporting each teacher's professional career and the development of teaching staff (see 4. 8.) on the national level. The newly established Institute for the Training of Teaching Staff conducts the network of regional in-service centres. Among public institutions of higher education, faculties of education and faculties training teachers give particular support to innovating schools and engaged teachers by lecturing, organising courses and workshops, monitoring and reflecting innovations, and conducting action research. The conditions for this provision have not been the most suitable for budget limitation and permanent reorganization of the structure and content of development programmes supported by public resources. The situation is currently changing because of new resources from EU structural funds which give extra finance for projects and innovative programmes supporting teachers' professional development and school innovations. In this matter public institutions often compete successfully with private ones, giving more expert complex and systematic support than casually and hastily established agencies.

- **Bottom-up initiatives:** A quite new phenomenon in the support structures is the informal voluntary activities of educational associations, non-profit organizations, NGOs and civil groups striving to support and care for progressive changes in education. A major influence on innovation in schooling has been achieved by the Permanent Conference of Associations in Education (SKAV). The Conference, established in 1999, has had the status of independent legal body since 2003. The SKAV, besides the support of innovations in schools, mediates an information exchange and communication between educational initiative groups, NGOs, state administrative bodies and the general public. Priorities of the SKAV are the following: * to support freedom and diversity in education, * to support orientation of schooling towards a complex development of children's personalities, * to emphasise changes in the curriculum * and to independent initiatives on curriculum reform which link up with others. Round tables of educational policy, organized monthly by SKAV together with the Centre of Educational Policy, discuss current problems of schooling. Results of the debates are published on the web and in the journal *Učitel'ské listy*, issued by SKAV. Member associations conduct in-service training programmes and workshops for teachers and school teams, provide consultations, and support projects and fundraising for schools, private agencies and firms. Besides this the methodical literature, journals and model portfolios for schools have been developed by SKAV members.
- **Educational research:** A complicated process of updating scientific knowledge for the support of school changes and teachers' professional activities is expected. Educational sciences, psychology and sociology should be particularly engaged in the transfer of scientific knowledge into educational practice (White book 2004, p. 45). In the initial phase of transformation cooperation was blocked by distortion of the infrastructure and fragmentation of educational research. Special supportive conditions for educational research have not been created but newly established teams, mostly acting at universities and at faculties educating teachers, have developed numerous projects competing with other fields (disciplines) for grants. Since 1993 the newly established Czech Association of Educational Research (ČAPV) has informally directed theoretical and methodological shifts in educational research and their contribution to monitoring actual problems of education. Particular sections of annual conferences concern research on school education, the curriculum, teacher education and the teaching profession. At present, besides the national institutes serving the resort research of the Ministry of Education, departments, institutes and centres of Universities and faculties provide educational research based on various grants and projects supported by ESF, the Czech Grant Agency Research Programme and the Development Programme of the Ministry of Education. Some of them have profiled themselves by concentration on particular themes and problems, For example, the Institute of Educational

Research and Development (Faculty of Education, Charles University in Prague) concentrates on the research into schooling and the teaching profession, while the Centre for Pedagogical Research (Faculty of Education, Masaryk University in Brno) focuses on the curriculum and research into the teaching process. The Institute of Educational Sciences (Faculty of Arts, Masaryk University in Brno) carries out research on social aspects and determinants of education, while the University Department of Education (Palacky University in Olomouc) deals with research on school and teacher education. Educational research, formerly under-financed and distorted, gradually has stabilized its infrastructure, improved its methodological basis and has profiled its concern by focusing on key problems of education.

4.10. Social Dimension

Last, but not least, among the dimensions of the educational transformation we must tackle the social dimension, the role of education in fostering social cohesion and combating social inequalities through education. To understand the change that has been achieved in this dimension we have to go back to the socialist era and characterize it briefly.

Between 1948 and 1989 the educational policy was built up in line with the official ideology of communist political elites that aimed to eliminate the mechanisms of social reproduction in education and that emphasized the possibility of upward mobility, especially for those coming from the lower social strata and enabling them to achieve higher levels of education. The goal to be achieved was equality of educational opportunity and this was widely understood in line with the concept of equality of results. The understanding of equity in that time is characterised by many authors as “statistical justice” (see e.g. Štech 2006), meaning that the main aim was to achieve the representation of different social classes at upper secondary and tertiary education at a ratio equivalent to their representation in society overall – i.e. a statistically equal representation of all classes.

For that purpose many other characteristics than just students’ ability were monitored in the process of admission to upper secondary and tertiary education (so called *kádrová kritéria*) – e.g. class origin and socio-economic status of the family, the political affiliation of the parents, rural/urban origin, or gender. The equality of educational opportunity was to be reached especially by proper selection and control of student intake at higher levels of education according to pre-set criteria (quota system). According to this practice of selection of students the educational system was perceived by communist officials as being by definition equal and just. Thus there was no need for research into educational inequalities. Even though the quota system has led to some positive results (e.g. equalizing the opportunity for achieving higher levels of education between women and men), Shavit and Blossfeld (1993), based on international data analysis, come to the conclusion that the impact of social origin on student attainment at higher levels of education was generally the same in former socialist countries and in capitalist countries.

The notion that “Communist positive discrimination” applied through the quota systems did not lead to significant results in reducing socio-economic inequalities in access to education is supported also by many other researchers (see e.g. Matějů 1993; Hanley 2001). Kreidl (2005) challenges this conclusion on a methodological as well as theoretical basis and shows by the data analysis that during periods of the most orthodox Communist egalitarianism in Czechoslovakia (1949-1953 and 1970-1973), socio-economic inequality in access to secondary and tertiary education did indeed decline.

The quota system was thus the main instrument for achieving equality of educational opportunity in the “real socialism era”, even though there is the disagreement on the effects of this policy.

The lack of the research data on educational inequalities in the Czech Republic could be seen as one of the relevant reasons why development in the social dimension has from our point of view been rather delayed compared to some other dimensions of transformation described above. According to J. Kotásek (2005b) the real reforms of the Czech educational system from a long-term perspective are only now being implemented, following their formulation in the White Book (2001) and their practical implementation and codification in the Education Act (2004). However, as we argue here, a formulation of deep systemic reform has not yet been achieved in this sphere.

After the political changes of 1989 the social dimension was not at the forefront of public debates and was not seen as urgent in comparison to the other areas and problems of education, e.g. de-monopolization of state education and opening room for freedom in school choice (resulting in the foundation of private schools and the restoration of early selection in multi-year *gymnázia*), de-ideologization and de-indoctrination of the content of education, and loosening of governance and control from the centre accompanied by the introduction of a broad level of school autonomy. In the early years of the transformation process the goal of achieving equal educational opportunities was thus mainly advocated by NGOs and active individuals.

It is the NGOs who have brought an agenda of equal educational opportunity to the forefront since the early 1990s and they started the actions (e.g. Roma teachers’ assistants) that were later implemented and supported by the state. The NGOs thus replaced the role of the state in the early years of transformation and they are still the engine of further progress. In the case of education for Roma children it is thus NGOs who run many of the progressive programmes (e.g. mentoring) and they influence policy formulation as well. The experts usually date the official (state) policy targeted towards Roma in October 1997 when the government adopted the so-called Bratinka Report on the Situation of the Roma Community. The most important measures oriented towards Roma inclusion were institutionalized and codified by the Education Act in 2004. Even though many programmes have been introduced since the 1990, and some new ones are being experimentally tested (e.g. community schools), we believe that there is still a lot of work to be done. We could instance the change in the goals of policies towards Roma that

stress integration and recognition and dissociate themselves from the policies of assimilation that were promoted during the socialist era. Stemming from this change of orientation towards integration and inclusion (that is also apparent in the case of mentally and physically disabled students and the support for their integration into mainstream schools), many actions and measures have already been implemented. However, the results of the first large piece of research on the situation of the Roma population in the Czech Republic were published in August 2006. This report identified the important challenges for the education of Roma children and analyzed some shortcomings of the programmes already up and running. It also promoted a large public debate in the media. The discussions mainly stressed the need for preparation of the long-term plan that would link interventions in educational policy with those in social policy. Even the foundation of a special institute is proposed. Thus with a critical eye we could say that in the case of the education of Roma we are somewhere on the way towards reconstruction and new complex policy formulation.

The leading role of NGOs is also apparent in the case of programmes targeted towards equal opportunity between women and men and in programmes for gifted students. A "Third sector" is an important actor in transformation, and in the policy formulation process.

The other important actor in the promotion of equality of educational opportunity to be analyzed here is represented by international and supranational organizations. In the Czech case two organizations need to be particularly stressed – EU and OECD.

The major impact of the EU is seen especially in legislative improvements in post-communist countries. The Czech Republic, among other countries, had to prepare new legislative documents especially with respect to disadvantaged groups (including national minorities, women, the disabled, etc.) and to combating discrimination. This was one of the criteria to be fulfilled for entering the EU on May 1st, 2004. These led, according to many authors (e.g. Davidová et al. 2005) and organizations, to a high quality of legislation in the 'New Member States' in the case of respect for minorities and disadvantaged groups that is in many respects better than the legislation of 'Old Member States'. Nevertheless the quality of legislation is not always translated into reality and practice in this area.

The EU also plays at present a very important role in fostering equity through the financial resources that come into the New Member States through European Social Funds. The programmes for disadvantaged groups and for combating educational inequalities are largely financed from these sources.

Another important actor to be mentioned here is the OECD. Activities of the OECD have contributed to educational change, especially through the analysis of the status of the education system. In the second half of the 1990s two country reviews of national policies for education (OECD 1996 and follow-up review ÚIV 1999) were developed. The presence of the OECD experts and their suggestions for the development of Czech education were very useful in this period of the search for an appropriate long-term plan and policy formulation. These reviews

pointed out (among many other things) the selective nature of education and recommended abolition of the newly re-constructed selective multi-year gymnasia. More generally, through the whole review the OECD stresses the importance of the equity perspective for policy analysis.

The discussion on equity in the Czech Republic was even more encouraged by the results of the OECD research project PISA (*Programme for International Student Assessment*), conducted in 2000, 2003 and 2006. The analysis of the data mainly from PISA, but partly as well from other international studies of student achievement (e.g. TIMSS, IALS, PIRLS – for the whole participation of the Czech Republic in these studies and wider discussion of the results see Straková 2003) revealed that the selective entrance examination to multi-year *gymnázia* at the age of 11 disfavors children with lower cultural capital. Thus students from the two lowest quintiles of SES made up only 15% of student population at these selective schools. The existence of the multi-year *gymnázia* largely contributes to a reproduction of educational inequalities (Matějů, Straková 2005).

The analyses of the data show that the Czech Republic belongs to the countries where the impact of family background on student performance is very high and also where the differences between schools are above the OECD average (the differences in results between schools are 1,5time larger than the OECD average). What is more, the schools largely differ in their socio-economic background. The school's socio-economic background explains 37% of the variance in the students' test results. This is the 7th highest value among the countries involved in the 2003 PISA study).

The selective nature of the Czech education system and the existence of multi-year gymnasia is widely criticized by the researchers and quite recently all political parties in the Czech Republic have also recognized it as a problem. This is a recent development that was made possible by the data evidence. We should keep in mind that the Czech Republic does not have national testing and thus the international data are the most reliable and representative data on student achievement. Nevertheless, there is a lack of political will to change the selective nature of education because, as the political parties repeatedly explain it, the "general public wants to retain these selective schools" (see part 4.4. above).

We could sum up that the social dimension was stressed mainly by the NGOs and the international organizations and their international benchmarking activities. The development in this area led to a gradually rising understanding of educational inequalities and some initiatives have already been implemented at state level. The importance of equity and staff participation. The school council, now a compulsory organ in every school, approves the programme. The Annual School Report, another instrument of school autonomy as a public document, informs all school partners about school results. The third basic instrument of school autonomy is a School Education Programme developed by teaching staff according to a common national framework. The development of school education programmes is part of curriculum reform (see above in part 4.5.). A substantial contribution to school autonomy has to come from self-evaluation. The development and implementation

of its instruments are the most difficult problem to be solved by schools. It is expected that help from research and development institutions will be necessary.

In the Czech case, a gradual increase in school autonomy was initiated from below, particularly by alert schools and independent professional groups. Further development demanded legislative regulation. The present implementation process requires external support and a common infrastructure for the work of school teams and individual teachers, consulting and networking at all levels of the school change management. The understanding that only through equity can we achieve a high quality of education is widely shared among the policy makers and researchers. This was made possible by the research evidence. However, although at the macro level it might seem that the important changes have been achieved, they have not been so well translated into concrete measures and school-level initiatives. Educational inequalities in the Czech Republic are one of the largest according to international comparisons. Even though the change started as a bottom-up process initiated by NGOs and active teachers, later on with the help and support of international organizations (EU, OECD), we need again to return to school level to achieve a real change that would lead to an equalizing of educational opportunities. The social dimension issue, according to our point of view, has not reached the level of systemic reform, but the new formulation of the complex system of combating educational inequalities should be drawn up, based on an analysis of the current state of affairs.

5. Key Problems and Perspectives

The Czech case, as stated above, provides evidence demonstrating in general the theoretical framework of the transition process, from the phases of deconstruction and reconstruction to partial stabilization and modernization. Concerning the phase of systemic reform, there is only a potential plan, a vision, a strategic framework sketched already in the White Book at the beginning of the new century. The process of building the new system has been much more complicated due to the unbalanced, diffuse, unstable and poorly controlled changes in the social and political environment. It has been lacking in experience, clear value preferences and a regular control mechanism. Multidimensional changes and the different interests of social groups and actors have brought new unexpected problems and have provided a real challenge to the capacity of those involved in education striving to build a functioning system. Lack of coordination of decisions at various levels and permanent „improvement“ of a decomposed system accompanied by the strong criticism of powerful groups of the public have been counter-productive. It has caused retardation of the transformation process, induced partial destruction of it, slowed down a performance of a real systemic reform and weakened the ability to act of effective actors and groups who have conducted a number of successful changes and have implemented partial reform measures. Education, in spite of its traditionally appreciated status, is neither a preferred value nor a real political priority in present Czech society. Economic support of education has not reached

the necessary planned 6% of GDP yet. The political discourse on educational reform has been prevailingly led by the partial aims and interests of political parties and social groups who have not sought a consensus. The social status of teachers has improved but real social support for this professional group has been rather weak and the criticism of schooling has been aimed often toward them without any broader social discourse on education. Numerous positive changes on the macro-level to the educational system have not reached down to the middle- and micro- level due to insufficient communication and cooperation, including lack of a suitable administration and implementation mechanism and instruments. On the other hand, positive changes and challenges on lower levels have not encountered sympathy, been made use of or given direction at the higher levels of decision-making. A wrong interpretation of curricular reform, and partly also media simplification, have built barriers to understanding the substance of it.

Special attention should be given to the European dimension of the Czech education and to the common strategies of the European Union on education. The expected, but as yet unrealised, systemic reform of the national school system depends on the creation of approaches helping to utilize European support, e. g. applications to European Structural Funds, and on finding appropriate ways of adopting a common framework to respond to national needs and conditions.

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FROM DECONSTRUCTION TO SYSTEMIC REFORM: EDUCATIONAL TRANSFORMATION IN HUNGARY¹

GÁBOR HALÁSZ

Abstract: *The study analyses the Hungarian educational transformation process following the change of regime in 1989 on the basis of a common analytical framework elaborated by the expert team of the international comparative study „Transforming Societies of Visegrád Countries and Their Educational Systems“ (led by the Institute for Research and Development of Education of the Faculty of Education of Charles University). The study presents the transformation process in ten specific areas, such as aims and functions, management and administration, financing, structural issues, quality control, school autonomy, the teaching profession, support structures and the social aspect of education. It examines the nature of the transformation process in each of these areas using the common analytical framework distinguishing three transformational phases: (1) deconstruction, (2) stabilisation/construction/modernisation and (3) systemic reform. It is argued, that the transformation process has progressed unevenly in these areas, and the stage of a coherent and deliberate systemic reform has not been reached in any of them. However, system evolution processes have moved the system quite close to the more advanced stage of systemic reform. The study puts a particular emphasis on the impact of the accession of the country to the European Union in the transformation process. It argues that two different transition processes have been superimposed: one from planned economy and one-party system to market economy and parliamentary democracy, and another from national sovereignty to community membership. These two different transitions made the transformation process extremely complex and made its social and political management particularly difficult. One of the main conclusions of the study is that the shift from the second phase of transformation (construction, stabilisation and modernisation) to the third phase (systemic reform) cannot be detached from europeanisation. This shift is strongly conditioned by the nature and the quality of the process of europeanisation.*

Keywords: *comparative education, education policy, education reform, education systems, educational change, educational transformation, European Union and education, europeanisation, systemic reform in education, transition in education, Visegrád countries*

¹ This study has been written in the framework of a broader international comparative study entitled „Transforming Societies of Visegrád Countries and Their Educational Systems“ led by the Institute for Research and Development of Education of the Faculty of Education of Charles University in Prague. July 2007.

1. Educational Transformation: An Analytical Framework

According to the common ideal-typical framework of the comparative study to which this paper is a contribution, three major phases of the transformation process are distinguished here. The first phase is dominated by the *deconstruction* of structures inherited from the previous regime and seen as inappropriate in the new political, social and economic context. In the second phase new operating ideas, new regulatory mechanisms, new institutions emerge. This phase is characterized by *construction*, relative *stabilization* and typically by *modernization*. However, many of the new institutions may later be found premature and to be impeding further transformation and development. What first appeared as stabilisation may appear later as the simple concealment of tensions and an obstacle to reaching a higher level of stability. This second phase may still be too much determined by the reminiscence of the past system, it may still be too transitional, and, therefore, may lack coherence. A real *systemic reform*² can be achieved only in a third phase, more than one or two decades after the great shift from one political regime to another.

The notion of *transformation* can not be separated in this analysis from that of *transition*. Similarly to other Visegrád countries, Hungary has gone (or is still going) through two transitions. The first transition from state-socialism to parliamentary democracy, a market economy and pluralism started when the political regime of the country was changed in 1989-1990. The second one started when the country associated itself with the European Union and, from an independent nation-state, became the member of a wider political and economic community. As the first transition was not yet completed when the second one started, the two transitions have been superimposed upon each other.

Normally the notion of transition designates the condition of an object that is going from one status to another, and where the target is well defined. When the target is reached, transition is over. In the case of Central and Eastern European countries, going from a planned to a market economy and going from the status of an independent state to the status of a member state, the picture is less clear than one would expect (see, for example, Birzea 1994; Radó 1999). In fact, neither of the two transitions has a clear destination in this case. The current idea of parliamentary democracy and a market economy is continuously challenged everywhere, and the European Union is also an evolving political entity which develops in an open-ended process. Although transition remains a necessary notion (e.g. for the explanation of many social anomalies) it might be more appropriate to talk about *open futures* and *continuous change*. In many Central and Eastern European countries the restructuring of the economy is still going on, and economic recovery

2 The notion of *systemic reform* became widely used during the eighties in the US, especially in the framework of reforming science education. Although it may have various meanings, those who use it stress typically two key elements: (1) changes affect all levels of the system (the classroom, the school, the local/regional district and the national level), and (2) they are generated or enhanced by a coherent and complex system of interrelated measures and actions (Fuhrman – Massell, 1992).

is not yet fully accomplished. The culture of parliamentary democracy and a market economy is not yet deeply rooted in these countries (see, for example, the existence of populist and *etatist* movements). After years of simplistic representations views about democracy and a market economy are becoming more realistic. It becomes clearer. For example, it is recognised that democracy and a market economy require an effective state that is able to protect the rule of the law and the rules of free competition. Democracy and a market economy do not solve immediately the inherited problems of low efficiency/productivity or that of the „culture of dependence“. There is a complex inter-dependence between education and society/economy in both market and planned economies, and new challenges and problems arise continuously.

Although, after almost two decades of unprecedented changes, transition is not yet over, the situation after this long period of transition is not the same as at the time of its commencement. Two phases of transition can clearly be distinguished: the first phase was characterised by a high level of uncertainty and unrealistic views; and education became, in this period, more detached from other social and economic areas. In the second phase actors started familiarising with the increasing complexity of the situation, a new dynamic emerged and education was re-attached to other social and economic areas (the dynamic of transition is presented in Table 1).

Table 1. The phases of two transitions

	Transition 1	Transition 2
Phase 1	Destruction of old structures and idealised views of parliamentary democracy and a market economy	Idealised views of the EU, no direct implications for the daily management of the system
Phase 2	Emergence of new structures and ideas and improved problem-solving capacity	Daily working relationship with the EU; the transfer of community goals and approaches to the domestic scene
Phase 3	Systemic reform	Europeanisation of domestic education policy

The third transformation phase – the phase of systemic reform – should probably not be conceived any more as a state of transition. This is also a phase of change, but its nature is different from the nature of phase 1 and phase 2. Although countries reforming their educational system following a systemic perspective are also in a state of motion, they are different from what we use to call “transition countries“. According to the definition given by a study of the *Office of Educational Research and Improvement of the U.S. Department of Education*, the “notion of systemic reform embodies three integral components: (1) the promotion of ambitious student

outcomes for all students; (2) alignment of policy approaches and the actions of various policy institutions to promote such outcomes; and (3) restructuring the governance system to support improved achievement" (*U.S. Department of Education...*, 1996). If we take this definition seriously, systemic reform means a permanent and conscious effort exercised at several levels in order to continuously improve learning. My position is that this state has not yet been reached in any of the Visegrád countries, and particularly not in Hungary. A possible outcome of this common study could be to acquire a definition of the conditions of a third shift from transition to systemic reform. Education transformation in Hungary will be presented in what follows within this double framework of transformation and transition.

2. Basic Information on the Country

Before World War I. Hungary was part of the Austro-Hungarian Empire. Between the two wars the country lived under a moderately authoritarian right-wing conservative regime and in World War II became an ally of the German Third Reich. After World War II the country became part of the communist Soviet bloc. Following a revolt in 1956, put down by the Soviet army, and after a relatively short period of violent oppression, the regime under the leadership of *Janos Kadar* liberalized the economy and realised a mild version of the Soviet-type regime, the so-called "Frigidaire Socialism" or "Goulash Communism".

The transformation of the regime after 1989 was a peaceful process, following the formal negotiations between a reformed communist party, ready to face free elections, and the new democratic opposition. The country held its first multi-party elections in 1990. The establishment of the political and institutional frameworks of a market economy was a relatively smooth process, although society lived through a dramatic shock of adaptation (between 1990 and 1993 during which one third of the active working population lost its job). The country joined the OECD in 1996, NATO in 1999 and the EU in 2004.

Hungary is a middle-sized country with 10 million inhabitants. After the change of regime it became a major target of foreign investment. Privatisation started early and progressed rapidly. Till the early 2000s the country was seen as leading the reforms in the Central and Eastern European region, but since then it has lost its leading role, mainly because of its incapacity to reform its public service systems. By the middle of the 2000s the deficit in the state budget had reached a level that necessitated drastic rebalancing measures. This situation was not unrelated to the way the country also lost its fame as an island of political calmness. After the parliamentary elections of 2006, when the government announced drastic austerity measures, the streets of its capital became the scene of violent riots.

The number of registered unemployed is not higher than in most European countries, but the activity level of the population is very low (see *Table 2*), much lower than the European average. The proportion of those who are neither in work, nor in education is particularly high among the population younger than

25. Until recently the growth rate of the economy was significantly higher than the European average. Due to the recent severe austerity measures the rate of growth has dropped below 3%.

Table 2. The proportion of the employed, the unemployed and the inactive population according to various age groups (2005,%)

	Employed	Unemployed	Inactive
Men between 15 and 64	63.1	7.0	32.0
Women between 15 and 64	51.0	7.5	44.8
Total population between 15 and 64	56.9	7.2	38.6
Total population between 15 and 24	21.8	19.4	72.9
Total population between 55 and 64	33.0	3.9	65.7

Source: The human resource development program of the National Development Plan, 2007

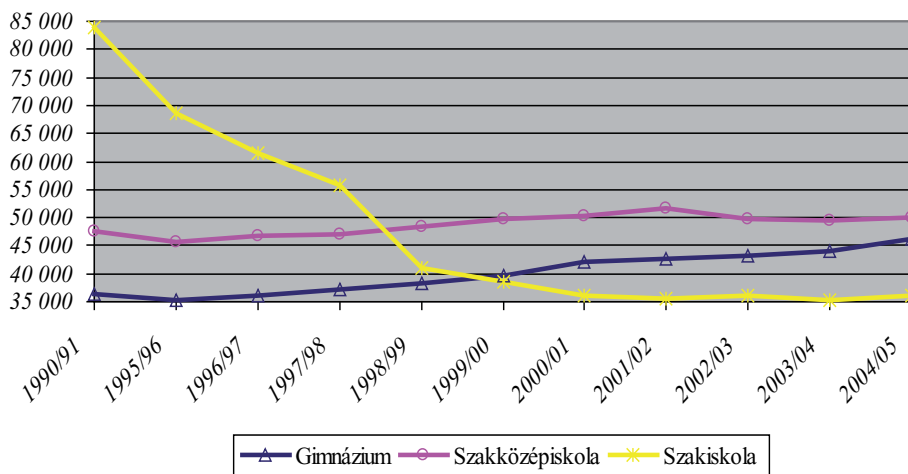
Ethnically the country is relatively homogenous. The largest ethnic minority is the Roma who make up 6-7 percent of the whole population. The Roma represent serious social integration problems that have significant implications also for school education. Two thirds of the Hungarian population declares itself Roman Catholic, but only one sixth is practising religion in a way that has a strong influence on their daily life.

3. The Education System

Responsibilities for governance are shared horizontally between the Ministry of Education and Culture (MEC) and other ministries (the Ministry of Employment and Social Affairs playing the most important role among them), and vertically, between the central government, the local (regional) governments and the schools. Local (and regional) self-governments, who are the owners of most pre-primary, primary and secondary institutions, have broad jurisdictions in education. Municipalities, as the owners of the schools, approve all major school level regulatory documents (e.g. rules of organisation and operation and the school level pedagogical program including the school level curriculum). They also determine the budget of the school and appoint its principal. The number of municipal councils (self-governments) maintaining schools is particularly high and their average size is very small. Institutions also enjoy a high degree of decision-making autonomy in terms of organization, functioning and financing. Their owners are not entitled to interfere in pedagogical matters. Unlike most European countries, in Hungary there is no national body operating as a state inspectorate. In 2004 more than 8% of pupils attended non-public schools (this proportion is around 5% in preschool and basic education and close to 15% in secondary education).

Education is compulsory up to the age of 18, although the first cohorts being obliged to stay in school up to this age have not yet reached it. Pre-primary education, catering for children from 3 to 7 years of age, is seen as an important integrated part of the school system. The attendance rate at this level, regarding the 3-5 age-group, is around 86%, with nearly 100% for the age-group 5 where attending is compulsory. Most pupils enter basic education at the age of 6, although an increasing number of them remain in pre-school for an extra year. The typical form of basic education is the "Általános iskola" (general school) which comprises the four-year long ISCED1 and the four-year long ISCED2 levels in one institution. However, since the early nineties, after grade 4 and grade 6 pupils have been able to apply for admission to the selective lower classes of "Gimnázium" (general academic school). In 2004 one fourth of pupils in grade 9 of the "Gimnázium" (typically 15 year olds) have arrived from the selective lower classes. The borderline between ISCED1 and ISCED2, due to various smaller interrelated policy measures (touching upon curriculum, teacher qualifications, financing and enhanced by development interventions), is being changed: ISCED1 level seems to be gradually and cautiously being lengthened from 4 to 6 years.

Figure 1. The number of pupils enrolled in grade 9 according to program types, 1990-2004

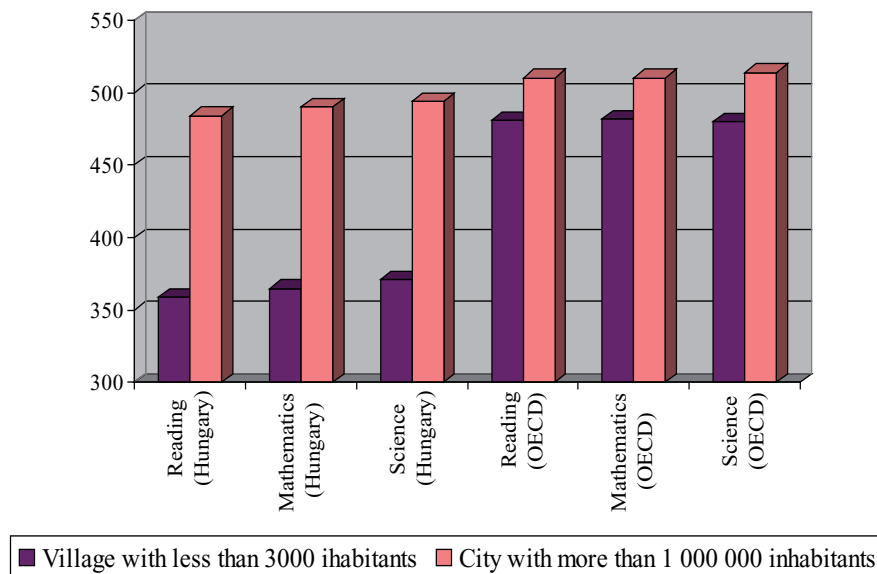


Most pupils transfer from basic to secondary (ISCED3 level) institutions at the age of 14-15, after completing the eighth grade class. This is, for most of them, the first major choice between programs and institutions. Typically they choose between three options: the "Gimnázium" (general academic school), the "Szakközépiskola" (professional secondary school) and the "Szakiskola" (vocational secondary school). In the academic year 2004/2005 98.7% of those completing the 8th grade of "Általános iskola" continued at secondary (ISCED3) level. The share of the three main types of secondary programs was dramatically restructured during the first half of the nineties: this happened mainly as a spontaneous process, due partly to

demographic changes, partly to parental choices, without deliberate planning (see Figure 1). According to legislation, vocational studies can be commenced after the age of 16, up to which pupils receive general education, even in vocational schools (although in these latter a significant amount of time is devoted to practically oriented learning and career orientation).

The curriculum, as we shall see in more detail in section “4.2.5. Curriculum, Curricular Policy and Development”, is regulated by a complex system of several layers and instruments adapted to the decentralised character of the school system. The highest level curricular document is the National Core Curriculum, which is a relatively short and concise document. Schools are organising teaching and learning according to their own school level curricula, which are influenced and determined by a number of various middle level “content carriers” and regulatory instruments (examination requirements, nationally accredited model programs, nationally developed digital contents, textbooks, vocational qualifications frameworks etc.). The National Core Curriculum defines ten broad “areas of culture”, and the various disciplines are grouped into these areas.

Figure 2. The average PISA performance in various areas according to type of residence in Hungary and in the OECD countries (2000, standard scores)



Source: The human resource development program of the National Development Plan, 2007

The decentralised character of the system is reflected in other areas as well. For example, as we shall see in the relevant section of this study, the system of financing is a two-layer system with different resource allocation mechanisms at central and local levels. National authorities do not control school or classroom level processes

directly, but accredit actors and define procedures, and organise the system so that the nationally recognised actors achieve their 'control functions' following nationally approved standards and procedures. However, all this happens under the direct control of local agencies. It is important to mention that cases of national standards and procedures *not* being respected by local actors are not rare.

While this system has been capable of combining far-reaching decentralisation with relative coherence, the measurable outcomes do not yet provide appropriate justification for it. As the well known PISA survey demonstrated, the level of achievement of the Hungarian education system is not only lower than most people would expect, especially as far as reading skills are concerned, but inequalities are also much higher (see *Figure 2*). It has to be stressed, however, that most of the mechanisms that could assure coherence and quality within the decentralised context have only gradually emerged, mainly since the middle of the nineties, as the result of a slow and difficult learning process, and as the result of a series of complicated explicit or tacit negotiation processes creating the new rules of the game.

At the time of writing discussions on the possible future of the system are still going on. For many players and observers changes have been too rapid, too big and, therefore, too difficult to absorb. For others they have not gone ahead enough, they were corrupted by too many compromises and, therefore, they remained uncompleted. Since 2004 the field of forces in which education policy is formed has been radically transformed by the accession of the country to the European Union. Although, in principle, according to the Treaty that creates it, the Union has no formal power to shape national education systems, in fact, education policy goals are now defined together with the larger community, represented by the European Commission. This is particularly true as far as development is concerned. Huge resources from the European structural funds are now available for development in the education sector, and the way these resources are used is determined by the National Development Plan negotiated not only internally between national political players, but also externally, between the nation and the Union. According to this, education policy goals, as they appear in various strategic documents, reflect the Lisbon Agenda of the Union. The key elements of these policy goals are lifelong learning, enhancing competitiveness, improving social cohesion and employment, and, in general, making school education more open to its social and economic environment and making it more relevant for social and economic life.

4. The Transformation of the Education System 1989-2006

4.1. The Transformation Process

Compared to other countries in the region, the transformation process in Hungary displayed a number of particularities that have had a determining impact on the course of changes:³

3 For more details see: Halász, 1990, 1993, 1998, 2003

- In the second half of the eighties, several years before the collapse of the communist regime, a radical decentralisation policy has been initiated and implemented, following an Education Act in 1985.
- When the political transformation started, a relatively autonomous and influential educational research and development community was already active, with a broad knowledge of educational trends and developments in the Western world. This community had a strong impact on policy thinking and action.
- On the basis of several decades of piecemeal state administration reforms, politically autonomous self-governing bodies were created at the very beginning of the political transformation and the ownership of almost all schools was transferred to them.
- Since governmental responsibility for vocational training was transferred immediately after the political transformation to the labour administration which had an increasing weight in government and had access to significant international development funds, employment policy has had a major impact on the development of the education sector.

Due to these particularities the deconstruction phase of the transformation process was not particularly long and not as deep as in several other countries of the ex-Soviet block, and the construction phase could start earlier. New education legislation, based on a very different logic than that which preceded it, was enacted as early as in 1993. To illustrate how the “new logic” differed from the old one, the following key elements could be stressed:

- The new law focused more on defining procedures and on regulating relationships between autonomous actors (schools, local councils, teachers, state authorities, parents) than on prescribing in detail the way institutions must operate or services must be provided. For example, local councils were obliged *in general* to provide educational services and not to run the institutions they became the owner of (that is, in principle, they could sell their school buildings and hire private service providers).
- New regulatory mechanisms were put into practice without knowing exactly what their concrete details should be. For example, the 1993 Law on School Education defined the National Core Curriculum and the school level curricula as the key regulatory instruments in the curricular area, although none of these yet existed.
- Vocational training was regulated in a separate law based on the assumption that training is shared between the institutions of the formal school system and the emerging new actors of the market economy. Thus, the regulation of the new training system was committed to the care of players and institutions that were still in the process of emerging from the new market economy.

Although a few years were needed for most actors to familiarize with the new logic of the system, and this logic, implicitly or explicitly, was questioned several times by the various players in the education policy arena, not later than in the

middle of the nineties the focus was already on stabilizing and further developing the new system.

A further particularity of the Hungarian case has to be stressed here: this is the rejection of the idea of a comprehensive reform, or at least, a kind of redefinition of what a comprehensive or systemic reform means. In this respect it is symptomatic that an influential policy concept published at the very beginning of the education transformation process held the title "*Anything but reform...*".⁴ The concept behind this title did not propose keeping the system unchanged but, in fact, to change it in a different way. Instead of a well-conceived top-down reform, the authors of this document proposed to change the overall regulatory framework so that changes could be brought about by various autonomous actors, and they suggested that the central authorities should only steer the changing system. A systemic reform, according to this approach, should not be orchestrated from the centre but emerge from accumulating bottom level actions.

Innovation became a particularly frequently used term, often displacing *reform*. As a consequence, although Hungary has not introduced a major reform transforming its primary and secondary education system, thanks to an extremely high number of national level developmental interventions and to permanently encouraged local innovations the system went through a fundamental transformation. A key feature of this transformation is that (1) it produced very uneven outcomes, including many that nobody wanted and (2) that some basic easily identifiable structural problems have never been solved. For example, by the second half of the nineties it became clear that the system, instead of reducing social inequities, was in fact boosting them⁵ and some years later it also became clear that it was financially unsustainable⁶. In the following sections the transformation process and its outcomes will be presented according to the most relevant problem-areas.

4.2. Particular Dimensions and Priorities

The transformation process has led to significant changes in all relevant dimensions of the school system, from aims to structures and to available resources through content and work organisation. The changes have had various sources. Some of them stemmed from deliberate political actions pursued by successful pressure groups that could push them through legislation and were able to persuade the key actors to follow them. Some of them have emerged from the uncoordinated action of various actors within the system: such as individual schools, families, teachers and pupils. Others were largely determined by structural constraints which were

4 See Lukács & Várhegyi, 1989. The theses of the reform proposal have been published in English under the following title: "*Educational Policy for the Nineties: theses for a new concept of state educational policy*" (Hungarian Institute for Educational Research, Budapest, 1990)

5 See for example the country report produced within the framework of the OECD thematic review on equity (https://www.oecd.org/document/3/0,2340,en_2649_34531_36296195_1_1_1_1,00.html)

6 See for example a document prepared by a national think tank called the Centre for Education Policy Analysis (*Országos Közoktatási Intézet, 2004*)

no different from those of other education systems, although local actors may have the feeling that they were achieved by them. A number of changes originated from within the education system, but many of them have just been passively received by it, since they have come from external sources (such as demographic changes or the changing stratification of society). The more than 15 years that have elapsed since the beginning of the great social-political transformation can be described as a period of swirling changes.

Given the decentralised character of a system which allows autonomous action to many influential actors, and, particularly, given the presence of contesting political forces that replaced each other several times in power positions, one cannot speak about a well guided and clear change process. Instead, we have to disentangle an extremely complex picture of changes and try to identify some major trends.

4.2.1. Aims and Functions of Education

Before the first free elections the scene of education policy already abounded with change proposals, new ideas, plans and concepts. All major social and political players agreed that schools must be autonomous; teachers should be given freedom to renew pedagogy; local communities should have a right to influence education. Autonomy, freedom and free initiatives have been the focus of public attention. There was also a strong desire to revitalize values from the time that preceded communism. Religion and ethics were to be brought back to schools. There were many references to Europe, although not many players in the education policy arena really knew what kind of challenges Europe (meaning Western Europe) was facing at that time. Practical goals like providing the economy with a skilled labour force or ensuring financial stability in public services did not receive much attention. The "classical" public service policy goals like quality or equity, especially in their more instrumental understanding, came to the sight of policy attention only in the middle of the nineties.

Although the discussion between conservatives and progressives, the left and the right-wing was present in education policy debates as in other countries, a particular feature of the Hungarian case is the relatively low impact ideology had during the analysed period. Following an early constitutional court decision on the issue of religious education, the secular character of state education has not been seriously questioned. Although the first freely elected government had a conservative, Christian and nationalist character, the first major legislation in the education field led, in 1993, to a Law on School Education based basically on liberal principles. In spite of some, sometimes quite loud, attempts to go back to the pre-war period, nostalgia for pre-communist times did not influence the outcomes significantly.

The way education policy was made and the way its goals and aims have been defined have largely been determined by the political colour of those who controlled the government agencies responsible for education. During almost half of the time since the beginning of the transformation a small liberal party was in charge of the

ministry of education, and its coalition partner, the socialists, controlled the ministry of labour. Although there were two election periods where conservative parties gained control of the ministry of education a genuinely conservative education policy (focussing, for example, on discipline and excellence) could not emerge.

Up to 2006 education policy was dominated by various modernisation goals and actions. Innovative schools could have access to resources provided by various developmental programs (from among which the educational development mega-program of the Soros Foundation in the second half of the nineties must be mentioned with particular stress). Under the influence of various internal and external factors, especially the accession of the country to the European Union, lifelong learning became an integrating principle of policy thinking. Investment in school information technology was and still is high on the agenda. Quality assurance methods have been imported from industry and implemented in schools.

As a reaction to these changes, by the middle of the 2000s a relatively high number of teachers and schools felt fed up with changes and strove for "calmness". When, in 2006, the socialists acquired control of the ministry of education for the first time, their major pledge was to slow changes and restore calm. Interestingly, however, this pledge is particularly difficult to accomplish for two reasons. First, because the changes of the previous period, no matter how many they might have been, did not address some of the fundamental, and still unsolved problems (like, for instance, inefficiency and the financial un-sustainability of the system). Second, because membership of a relatively underdeveloped country in the European Union means, unavoidably, development constraints and obligations, backed by huge amounts of development resources.

4.2.2. System of Educational Management and Administration

It is in the area of the system of educational management and administration that some of the key features of the transformation process appear perhaps most strikingly. As mentioned earlier, a policy of school administration, linked to a decentralisation policy in the broader system of public administration, had been implemented several years before the change of political regime. Following the first free elections and the taking of power by the first freely elected (conservative Christian nationalist) government the question of school autonomy and decentralisation was raised again. Many of the supporters of the new government did not see in the decentralisation of the late eighties anything other than a sign of the disintegration of the previous communist regime and wanted to return to more centralised administrative patterns. In fact, decentralisation in its early phase was not much more than a simple deconstruction of earlier power mechanisms without the building up of new ones. In this period decentralisation could also appear as a provisional state, closely related to the collapse of the previous regime, especially to the dissipation of its economic basis.

The approach of going back to a more centralised model of educational administration was, however, blocked by the fact that this would have required an amendment to the constitutional law on public administration which would have

demanded a two-thirds majority in parliament. But this was made difficult also by the fact that the state could only have strengthened its legal powers to control education, without being able to pump any more money into the system.

The slow process of building up the new mechanisms of more efficient state which would steer towards a decentralised administrative environment started in the middle of the nineties. This has been a process of difficult collective learning based on trial and error, and accompanied by many deviations, uncertainties and tensions. One of the first components of this was the establishment of the already mentioned two-tier curriculum regulation system (to be presented in more detail in section "4.2.5. Curriculum, Curricular Policy and Development"). The paradox of establishing a new control mechanism adapted to a decentralised environment appeared clearly and strongly in the debates on curriculum regulation. Although *de facto* since the beginning of the nineties and *de jure* since the adoption of the 1993 Law on School Education, there has been no nationally valid central curriculum, those who introduced the new national core curriculum in 1995 were seen more as reducing central control than as introducing new control mechanisms.

The current framework of management and administration was, in fact, established by the 1993 Law on School Education. This legislation has created a balanced power triangle whose three points represent three centres of power: the national level of government, the local councils and the schools as professionally autonomous institutions. Although the basic legal frameworks were created in 1993, it took quite a long time for the various actors to learn how to live in this new space of three centres of power, and how to solve problems that arise within the particular dynamics of this space.

Attempts to bring back the mechanisms of direct central control have appeared in several ways. For example, the 1993 Law on School Education established territorial administrative units subordinated directly to the ministry of education following a pre-war model (these units were abolished a few years later after a change of government). The same law contained a provision that would allow the removal of the financing of teacher salaries from the unified system of local public financing, and put this under the direct control of the ministry of education (this option was also rejected a few years later). It was only following the first major amendment of the Law on School Education – that is, after 1996 – that the dominant policy line became the one that aimed not at re-centralising but at building up new mechanisms of indirect central control within a decentralised context. The 1996 amendment to the Law on School Education introduced, for instance, the regional planning of school infrastructure development and supply under the jurisdiction of county councils with overall national level steering. The same amendment added a key paragraph to the Law on the "system of evaluation and measurements" in school education. It was also the 1996 amendment of the Law on School Education that established the first genuine and coherent quality and demand-oriented regulatory mechanism in the area of teacher professional development (see section "4.2.8. The Teaching Profession" for more detail). This mechanism, while fully adapted to the decentralised context and entirely demand-driven, allowed strong national control

over quality and resources, and was open to further development aiming at more strategic steering by national agencies.

By the end of the nineties national level agencies were in possession of a wide range of instruments to be used for strategic steering in decentralised conditions. Financial incentives became one of the most important of these instruments. In the two-tier system of public financing, already mentioned, that emerged following 1989 (see next section in more detail) local governments gained almost full freedom to determine the budgets of their schools. However, the calculation of state subvention given to local governments remained dependent on the so called “*sectorial normatives*” (e.g. the number of pupils enrolled into particular programs). Through the definition of these sectorial normatives in the yearly law on state budget, the state could heavily influence the behaviour of local governments (for example making them entitled to get more money only in the case of organising a specific type of service determined centrally). From the end of the nineties special development funds, allocated directly by national authorities to schools or to local governments on the basis of open tenders, became a major tool with which to influence the behaviour of local actors (schools and those responsible for their management). For example, local councils could apply for state financial support by submitting proposals on improving the local management of education or on organising the professional evaluation of their schools.

The use of similar instruments became dominant in national efforts for ensuring the achievement of quality and equity goals. For example, at the end of the nineties a major program – named *Comenius 2000* – was started, aiming at assisting schools in establishing an internal quality assurance system based on centrally elaborated and authorized protocols. Later on, significant resources were made available for supporting schools which implemented various equity oriented programs. Quality and equity requirements were built into the terms of references of many developmental interventions, which meant that applicants could gain state money for developmental activities only if they met these requirements.

A further important aspect of the development of governance and administration is the development of the institutional frameworks for social partnership, social consultation and mediation. The 1993 Law on School Education was already elaborated within a very intensive web of communication and consultation with various professional and social organisations. This Law created the *National Council for Public Education*, with representatives of professional associations, teacher training institutions, scientific communities and – later – the business community. This body became a key player in curriculum and examination matters, enjoying a right of veto in these areas. The same law also created the *Council for Education Policy* with representation from school governors, teacher unions, parent and pupil organisations and government agencies. This body could discuss all education policy issues, excluding teacher salaries and working conditions which remained part of another institutionalised negotiation framework. Among the many developments in this area it is worth mentioning the establishment, at the end of the nineties, of the post of *educational ombudsman*. This opened a new way of tackling the many

conflicts and tensions that unavoidable appeared in the decentralised system with an increasing number of active actors with conflicting interests.

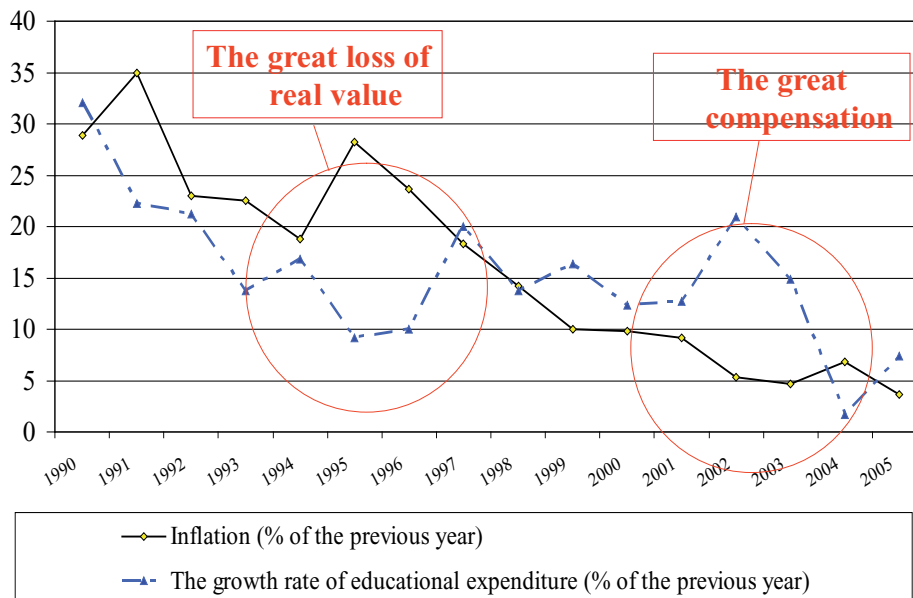
All these events show that, as emphasised earlier, national authorities, instead of trying to control school processes directly, started to devise indirect instruments, like accrediting autonomous actors and defining standards or procedures to be followed by autonomous local players. The fact that national standards or nationally defined procedures are, as mentioned earlier, not always respected by local players is a particularly important feature. This raises the question of whether, after a shorter or longer transition period, local actors will learn how to play correctly within the framework of national standards and procedures and how to use their freedom to improve quality or whether the system of indirect regulation will prove to be ineffective and a return to less sophisticated and less advanced methods of regulation will become necessary.

The development of the system of management and administration illustrates well the complexity of the transformation process. Before 1989 school autonomy was the key slogan, and the main target of the dominant actors was the reduction of direct political control by the state. The formal construction of a new administrative space was achieved in 1993, but the emergence of real and more efficient social practices viable in this new administrative space took several years. In this process, school autonomy was reinforced but also counterbalanced by local/regional planning, by increased financial responsibility and by the growing capacity of national actors to use effectively the indirect regulation tools.

4.2.3. Financing the School System

In 2004 Hungary spent 3.7% of its GDP on school education which was 0.1 percentage point higher than the OECD average. Two years earlier the figure for Hungary was only 3.1% and today (in 2007) it is again probably much lower than the OECD figure. The reason is that in the autumn of 2002 there was a 50% salary increase in the public sphere which has, since then, partly been lost due to inflation. In fact, the whole period analysed here was characterized by capricious changes and sometimes drastic shocks. Following the parliamentary elections in 2006 the education system was facing again a severe restriction period. This reflects the unbalanced nature of budgetary and, related to this, education policy. Efforts to improve financial conditions have been followed regularly by drastic measures of austerity. As shown by Figure 3, during the first half of the nineties attempts were made to keep the growth of educational expenditure close to inflation, but in the middle of the decade drastic austerity measures decreased dramatically the real value of expenditure. A few years later efforts were made to compensate for this loss, but in 2004 the real value of expenditure again decreased.

Figure 3. The growth of educational expenditure and inflation (1990-2005)

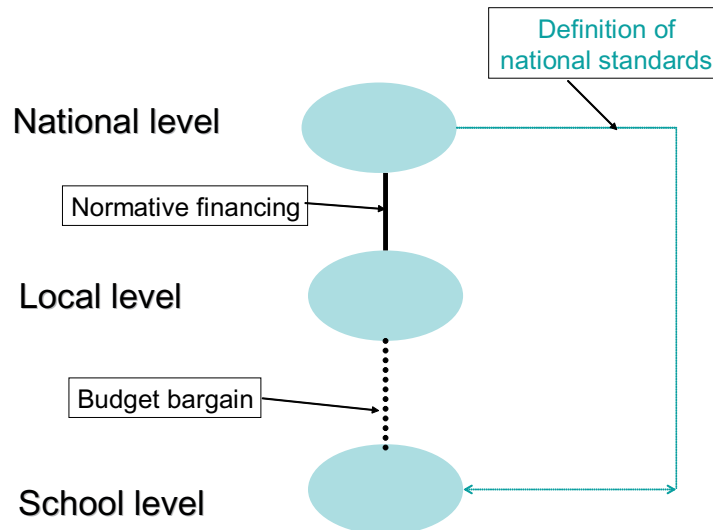


In fact, the system has inherited serious efficiency problems. Hungary employs more teachers for the same number of pupils than most OECD countries (in 2004 the country employed more than 20% more teachers per 1000 pupils than the OECD average). This inefficiency problem was for a long time hidden by the fact that the cost of the teacher workforce was low, but when, in 2002 teacher salaries were raised significantly, this overstaffing became apparent. Although in 2004 the country spent a higher percentage of its GDP on school education than the OECD average, individual teachers earned a much lower percentage of the per capita GDP than did their colleagues in other OECD countries (the Hungarian figure was 91% for lower secondary teachers with 15 years of practice as against 132% as the OECD average).

The system of financing education has been incorporated into the overall system of local public financing by the 1989 public finance reform. Since then the basic pattern has not changed. This means that local councils receive a lump sum of state support through the budget of the ministry of the interior for the totality of the public services they run, and they have to complement this from their own sources. A state subvention is distributed among local councils on a normative basis, the principles of which are set down every year in the law on the next year's state budget. Education indicators (like the number of pupils attending certain school types or programs) are taken into consideration when the overall sum is calculated, but these have only an indicative value: they leave local governments free to allocate money to schools as they want. This freedom is, however, seriously limited by the national standards set by the Law on School Education and some other pieces of legislation, like, for example, the law on public employees and the national salary scale defined by this. According to this, the system of financing

school education can be described as a two-tier system (which is similar to the system of content regulation), in which the logic of budget allocation is different at macro level from the logic at micro level (see Figure 4).

Figure 4. The two-tier system of financing school education in Hungary



Although during the last 15 years there have been many proposals to change the mechanism presented in Figure 4, especially by taking teacher salaries out of the overall system of local public financing, this could not be implemented as this system is constitutionally deeply anchored (only a two-thirds majority vote in parliament could alter it). It is interesting to note that it took several years for the key players to learn the logic of the double-tier system, that is, the fact that things follow a different logic at macro than at micro level. For example a battle won in the parliament in the annual budget debate on overall educational norms could be lost the following day if the parliament voted on increasing the percentage of income tax to be reallocated to councils or on putting a limit to local taxes. This demonstrates one of the most important features of the transformation process analysed in this study. Practically all systems of regulation established after the fall of communism are much more complex than those that operated under the planned economy. Learning to operate in this new and much less transparent context has been, and still is, a major challenge for all players of the education policy scene.

The system of financing also deserves particular attention in this context of educational transformation because of the great unsolved problem of financial inefficiency. It is an open question whether this problem can be solved without major comprehensive reform. If, for instance, the relatively high demand for teachers is linked with the structural features of the school system (as ISCED1 level education lasts only four years the need for subject teachers is higher than

in systems where this education level is longer), probably only national structural reforms could achieve a solution. But one can also observe developments showing that, at a certain level, even basic structural features can be modified by a series of local actions. This is apparent in the behaviour of many local councils, which are currently reorganising their schools so that all institutions are merged into one large one at city level, and within this large new institution structures are modified using simple internal organisational measures.

4.2.4. The Structure of the Educational System

Since 1989 many structural changes have taken place in the school system and many new structural tensions have arisen: it is not possible to give even a rudimentary picture of these here. In the introductory chapter some elements of structural changes have already been touched upon: these will be complemented here by only a few further elements that are particularly relevant for a deeper understanding of the transformation process.

Structural issues have been particularly strongly determined by political considerations and the polarisation between the various political actors has been perhaps strongest in this defining area. Another key feature of this area is its complexity, and the difficulty for the different actors to understand the logic of structural tensions and the possible long-term implications of structural changes. Debates on structural issues have always tended to be dominated by poor information, narrow perspectives and professional prejudices. It is not surprising that since the beginning of the nineties many of the better-informed of those involved in education policy-making in Hungary have been of the opinion that it is better not to open the Pandora's Box of structural questions when arranging policy discussions.

The original plan of the new National Core Curriculum proposed to change the existing 8+4 structure into a 6+4+2 one, with the ISCED1 level lasting ideally 6 years, and the ISCED3 level only 2 years. This proposal ran into heavy resistance. Critics accused those formulating the proposal of wanting to reduce the common part of schooling, thereby harming small village schools, making schooling more selective, destroying academic secondary education and so on. The dispute ended with a strange compromise: practically all players accepted that the age of compulsory schooling be raised to 18, which was legislated for in 1996. Since then, a number of piecemeal steps have been taken that may push the system towards the 6+4+2 structure, but this is not any more an explicit policy goal. For example, the internal curricular arrangement of technical secondary schools has been changed so that in grades 9 and 10 pupils learn only general subjects and their professional training starts only in grade 11. Specialised vocational training cannot be started any more before grade 11, even in vocational schools. ISCED1 teachers have been allowed to teach certain classes in grades 5 and 6 and the training of ISCED2 and ISCED3 teachers is being unified. With the introduction of the advanced level of the secondary school leaving examination, pupils were obliged to make a choice in grade 11. That meant that the learning profile of pupils in the last two years of

secondary education became differentiated. In certain periods financing incentives have also encouraged local authorities to go towards the 6+ system. In spite of all these changes, Hungarians still think their school system has an 8+4 structure.

Another structural development that deserves particular attention is the emergence of six- and eight-year academic secondary schools (comprising both the ISCED2 and the ISCED3 levels). This was made possible by an amendment to the education law in 1990. Although the development of this sector has never been a policy goal (on the contrary, almost all political actors condemned this trend), the number of academic secondary schools enrolling 10 and 12-year-old pupils increased up to a level where in grade 9 almost one third of pupils enrolled in academic secondary schools have entered this sector at the age of 10 or 12. This proportion, after a few years of slight decrease, was around 25% in the middle of the 2000s.

The fact that pupils are enrolled in radically different programs at the age of 15 came to be seen as strongly problematic following the publication of the results of the first PISA survey. The survey showed that Hungary possessed one of the most selective systems in Europe. However, no serious attempt was made to alter the structural characteristics of the system. While there is no way of returning to the pre 1989 8+4 structure, the alternative 6+4+2 (or a similar three-tier) structure cannot gain any consensus. The tendency to sweep problems under the carpet in this area is symbolised, among other things, by the fact that since 2003 the National Core Curriculum has defined the cycle of 9-12 grades as a unified phase of schooling with homogeneous content requirements. Although one quarter of pupils in grade 11 and 12 attend specialised vocational training programs, (that is, they follow learning pathways fundamentally different from those in secondary schools leading to the Maturity examination), the National Core Curriculum, which is meant to regulate the common core content across the whole spectrum of schools and programs, covers grades 11 and 12, instead of restricting the common core to ISCED1 and ISCED2 levels.

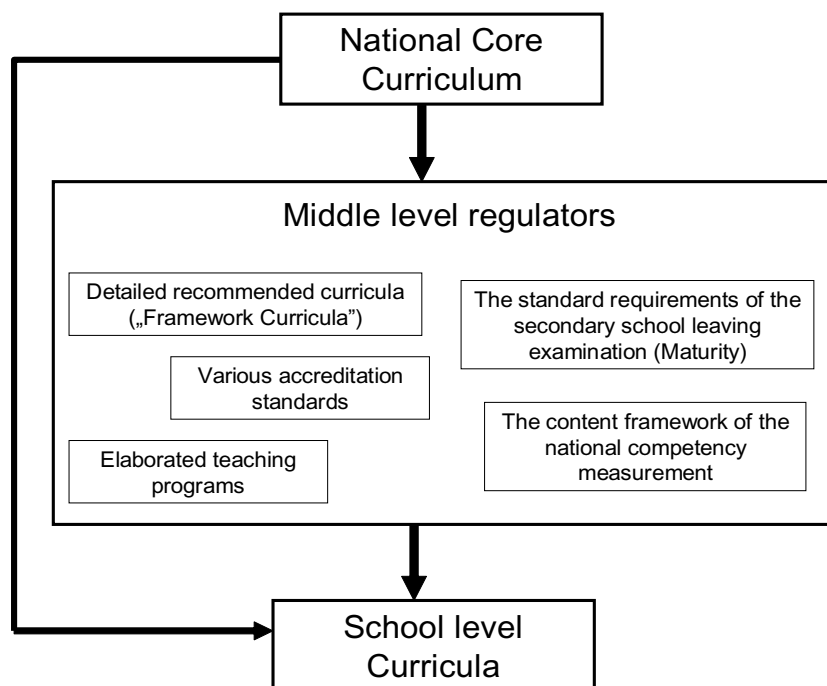
From what has been said above, it must be clear that in the area of school structure even the deconstruction phase is not yet over. Although there are processes of reconstruction, modernization and stabilization, the scene is characterized by the fact that the system and its actors have not yet been able to elaborate viable solutions and establish consensus around it. As mentioned in the previous section, it is not excluded that the decentralised character of the system may achieve some solutions. As local councils, (the owners of the schools) have a great deal of freedom to shape the organisational features of the schools, and as the boundary between the internal organisation and systemic structure has been blurred, new structural arrangements may emerge without structural reform at a national level. This can be enhanced also by the vague borderline between curricular and structural policy.

4.2.5. Curriculum, Curricular Policy and Development

The current system of curriculum regulation has emerged from a complex process of development that started before the changes to the political system. Although it

is still in a state of evolution, its main features were fixed in the 1993 Law on School Education. This is a two-level system with, at one extreme, a national framework setting overall standards and, at the other, detailed school-level curricula which, in fact, regulate daily teaching at classroom level. Between these two tiers there is a middle-level regulatory framework which consists of a rich variety of instruments (recommended detailed curricula that schools can apply as their particular school curriculum, well elaborated and documented teaching programs, textbooks and electronic content carriers etc.) offered to schools partly by the state, partly by market players. School-level curricula are also strongly influenced by the system of evaluations and examinations, especially by the secondary school leaving examination (Maturity) and the new, so-called *competency measurement system*. This latter is a test-based measurement covering every school and every pupil in certain grades. A scheme of the system of curriculum regulation is presented in Figure 5.

Figure 5. The system of curriculum regulation in Hungary (2007)⁷



It is important to stress again the organic nature of the development that led to the emergence of the complex system presented in *Figure 5*. When the process started, more or less simultaneously with the change of regime, only the top and the bottom level of the system were envisaged, and everything in the middle

⁷ This is a modified and enriched version of a diagram presented in *Vágo & Vass, 2007*

was the outcome of a development conditioned by the need of those involved to reduce uncertainty created by the disappearance of the detailed national level regulator. They also demanded an increase in the capacity of the system to assure quality and further efforts at modernisation.

This development is a clear example of shifting from the deconstruction phase to that of construction, stabilisation and modernisation. It is an open question whether the phase of systemic reform has been reached here. The reform of the secondary school leaving examination, the building up of the system of competency measurement and a major development program started in 2004 aiming at the production and dissemination of elaborated teaching programs may be seen together as an overall curriculum reform deserving at least partly the attribute of being 'systemic'. However, most analysts would probably question statements asserting this. Looking closer at three of the major middle-level components, the reader may try to answer the question of whether Hungary is deliberately implementing a systemic reform or is only trying to connect elements that have sometimes drifted off in divergent directions.

The reform of the *secondary school leaving examination* started in the middle of the nineties following the publication of a reform plan that contained three major elements:

- transforming the Maturity examination into one which allows pupils to choose between two levels (basic and advanced) in each discipline
- making the examination more standardised, based on nationally elaborated tests and correction procedures
- making the examination more externally controlled and connecting it with the entrance procedure to higher education

After one decade of debates, research and field trials the new Maturity examination was introduced in 2005. By this time the three goals enumerated above were complemented by a fourth one: shifting the nature of tests from controlling the recalling of memorized facts towards measuring competencies and the capability of students to apply their knowledge.

The building up of the system of *competency measurement* was started in 2001, under the strong influence of the first PISA survey. The idea was to give every school feedback on how successful it was in developing general competencies in two areas: reading comprehension and mathematics. After two years of testing the system, it was integrated into education legislation through, 'symptomatically', the annual budget law in December 2004. The fact that the regular (yearly) competency measurement was made part of the Law on School Education by the adoption of a yearly budget law is symptomatic because it shows that major reform elements may "get through" only by the method of following disguised procedures. The first detailed and explicit content (curricular) framework behind tests of competency measurement was elaborated only years after the measurement system was put into operation, without raising the question of the relationship between this and the framework set by the National Core Curriculum.

The development and dissemination of *detailed teaching programs* (program

packages) was started in 2004 within the framework of the first National Development Plan financed from EU structural funds. These program packages have been developed on the basis of a concept that criticized the quality of school-level curricula and the lack of professional quality instruments that could guide schools and teachers to develop their school-level documents and related pedagogical procedures. The new program packages, the test versions of which were tried out in a limited number of innovative school clusters, contain everything needed for a good quality organisation of the learning process: the description of learning goals, definition of required teacher competencies, teaching materials, methodological ideas adapted to various learner groups, evaluation instruments and so on. Here again, at least at the beginning of the development process, the question of the connection between this new powerful instrument and the National Core Curriculum was not raised. This project was conceived as the implementation of a program aiming at developing a set of competencies that were defined within the National Plan of Development negotiated with the European Union.

Looking back from the time when this study is being written to the time when all these new developments were conceived and a decision on their implementation was taken, it is practically impossible to identify a coherent and deliberate strategy of systemic curriculum reform. The different elements were initiated by different actors who sometimes were involved in heavy professional and political debates with each other. Nevertheless, when one looks at all these developments together, and one discovers the quite strong and deep connections between them, one cannot avoid the feeling that they together make up the elements of systemic reform.

4.2.6. Monitoring and Quality Control

People tend to link monitoring and quality control with inspection. As mentioned earlier, there is no state inspectorate in Hungary. Inspection, which operated earlier in a devolved way (under the direct control of regional councils), was abolished following the 1985 Education Act. Although there were several attempts to reconstruct it, these attempts have so far failed. Teachers are supposed to be controlled by their employer, the principal of the school, through the normal internal organisational mechanisms of controlling working personnel. Agencies which are external to the school cannot send inspectors to see what teachers do in their school. As for the quality of the work of the school as an organisation, this is the responsibility of its owner, the local (regional) council. Given the high number and relatively small size of municipal governments, it is evident that this arrangement cannot adequately ensure quality. As concerns about quality are high, but most of those players of the education policy scene who can effectively influence the policy process do not believe in the capacity of state inspectors visiting teachers and schools to assure quality, a number of measures and instruments have been devised for quality control since the early nineties. In this area one can observe a similar process of evolution to that in the area of curriculum regulation.

Table 3. Instruments of quality control and development

Actors	Instruments
Government (Ministry of Education)	<ul style="list-style-type: none"> - <i>Curriculum</i> <ul style="list-style-type: none"> . defining curricular standards, . providing nationally developed teaching programs and controlling their quality - <i>Assessment, evaluation</i> <ul style="list-style-type: none"> . competency measurement (testing pupils in every school) and related measures (e.g. in the case of low achievement) . defining secondary school leaving examination standards . organising directly upper level examinations . sample-based international surveys - <i>Accreditation procedures</i> <ul style="list-style-type: none"> . state accreditation of teaching programs . state accreditation of textbooks . state accreditation of evaluation experts . state accreditation of in-service training courses and providers . state accreditation of quality experts (not in use any more) - <i>Institutional level quality management</i> <ul style="list-style-type: none"> . prescribing institutional level quality management and its standards . national quality award . developing evaluation and school level quality assurance instruments - <i>Expert system</i> <ul style="list-style-type: none"> . national list of accredited experts and related standards - <i>Other</i> <ul style="list-style-type: none"> . operating the National Centre for Evaluation and Examinations (+ regional units) . the establishment of a National Council for Evaluation in Public Education . commissioning various expert analyses (national and regional) . a quality evaluation development component in the National Development Program . a national strategy for quality evaluation . financial incentives to local self-governments to conduct school evaluations . educational ombudsman

Local councils (self-governments)	<ul style="list-style-type: none"> - <i>approving the pedagogical programs of schools</i> - <i>operating an internal quality management system</i> - <i>evaluating institutions through</i> <ul style="list-style-type: none"> . expert reports . school self-evaluation . opinion of school council . evaluation by regional service institutions and experts . examination results - <i>other instruments</i> <ul style="list-style-type: none"> . e.g. appointment of heads, budget . overall surveys (by private evaluation companies)
Institutional leaders	<ul style="list-style-type: none"> - <i>compulsory institutional quality management program</i> - <i>compulsory personnel evaluation</i> - <i>school level evaluation of pupil achievements</i>

At the beginning of the nineties, immediately after the great political transformation, the debate on monitoring and quality control was dominated by the discussion on input versus output control. Those who argued in favour of output control said that determining in detail what teachers have to do and controlling whether they really do it is an inefficient way of controlling quality and suggested the use of instruments controlling outputs or results. The meaning of quality has also undergone major changes during the decade. Before the middle of the nineties, and long back into the past, quality was more or less synonymous with academic excellence. High quality education meant an education that could produce academically capable pupils, and one of the widely recognised tests of this was the achievement of pupils in various national and international academic competitions. Those teachers and schools whose pupils showed a high level of achievement at these competitions were seen as being good quality.

In the middle of the nineties a new professional group, expert in quality issues, started to emerge. A series of debates was initiated on this issue where various quality paradigms were confronted and a kind of consensus was reached. According to this, quality has three equally important references: (1) national standards, (2) goals set by individual institutions and (3) the demands and expectations of the users of educational services. A school can be seen as producing good quality if it is good in each of these three dimensions. This was a major breakthrough as it opened the way to reconciling diversity and quality and it also made it possible for schools enrolling difficult pupils to get the label 'high quality'.

The emergence of various quality control instruments is again a typical example of the development of education in Hungary. Various actors have invented various instruments in different periods. They convinced politicians and legislators of their value or, possessing the appropriate resources, they simply started using them. As a result of these more or less uncoordinated developments, by now there is a

remarkably long list of quality control instruments operated by various actors in the country (see Table 3).

There is perhaps one item in Table 3 that has to be commented on in more detail: this is the prescription of institutional level quality management. As mentioned earlier, a development project called Comenius 2000 led by the end of the nineties to the spreading in schools of quality assurance methods imported from industry. These methods, based on a national protocol elaborated by the ministry of education, were close to what is known as Total Quality Management. In 2002 a ministerial decree made the creation of a system of quality management compulsory for every school, and later on this was integrated into the Law on School Education.

Most of the items in Table 3 are in a constant process of development. For example, the competency measurement, presented in the previous section, has undergone, since its inception in 2001, several major developmental phases. It has been extended to more cohorts than at the beginning, its feedback mechanisms (reporting back to schools and teachers) have been significantly improved, the content framework behind the tests is being permanently reworked and a number of further improvements are envisaged. A recent development is the prescription of specific measures for schools that present lasting low achievement. This instrument also takes the form of extended debates within professional circles: for example on the question of whether results should be made public or not.

The system of quality evaluation, like other elements of the transformation process in education, has been and is strongly influenced by European and broader global developments. For example the recommendation of the European Parliament and the Council⁸ on quality evaluation has often been used as a reference when adding new elements to this system or when proposing the modification or the replacement of some of them.

Learning is a key element of the construction of the complex edifice of quality control. The early debate of input and output control, the new definition of quality or – something that has not yet been mentioned – the emergence of significant distinctions between notions that used to be seen earlier as having more or less the same meaning (like effectiveness, efficiency, achievement, success and quality or assessment and evaluation) are all signs of this learning process. This case shows again that transition has been going on not only from communism to democracy and from soviet block to EU membership but also from systems conceived in simple terms to more complex ones.

The question of which phase has been reached in this area is not easy to answer. It is clear that the construction, stabilisation and modernisation phase started years ago, and this phase produced significant results. If one looks at all the instruments used for ensuring the quality of education in schools, one may discern a quite coherent system, consisting of strongly interrelated elements that may reinforce each other. However, it is clear that behind the development that produced the

8 Recommendation of the European Parliament and of the Council of 12 February 2001 on European Cooperation in Quality Evaluation in School Education (2001/166/EC)

emergence of all these elements there is not anything that could be called a systemic reform according to the definition referred to in the introductory section of this study.

4.2.7. School Autonomy and Its Instruments

Much has already been said about school, autonomy. As mentioned earlier, the idea of school autonomy appeared and was in great measure implemented before political transformation. As in many other countries moving from centralised to decentralised governance, the elaboration of the meaning of school autonomy was a rather long and complicated process. At the beginning of the nineties most actors on the education policy scene did not make a clear distinction between institutional and sectoral autonomy, that is, a move towards a system under the exclusive sectoral control of the ministry of education would have been conceived by many as moving towards autonomy even if this had been done within a centralisation framework.

The legal framework of institutional autonomy was created, in fact, by the 1993 Law on School Education, and was developed further by various amendments later. The 1993 law specified well the major areas of jurisdiction of schools as institutions (for example creating its own organisational and operational rules, establishing its own pedagogical program as a strategic document regulating the totality of the pedagogical process in the institution and including the detailed school level curriculum). Most institutional powers were put into the hands of the community of teachers, with a relatively weak (“much responsibility, little power”) role for the principal. The self-governing power of the teaching community was seriously restricted by the extended rights of the owner of the school (in most cases the local council) to formally approve all key school- level regulatory documents. However, the power of the owner has also been limited by that of the school: when approving the basic documents it can judge them only from a financial and purely legal point of view and has no right to interfere in professional matters.

At school level the 1993 law counterbalanced the power of the teaching staff with that of the school council consisting of representatives of parents, pupils and the local community beyond that of teachers. Since 1996, however, the status of school councils has been quite ambiguous. The 1996 amendment suppressed the compulsion to establish school-level councils, but this body still has to be consulted on many specific issues (for example on how to use the financial resources collected by the school from non-public sources).

By the end of the nineties the discussions on the question of school autonomy had vanished. Most players in the education policy arena understood that autonomy does not mean lack of external control and that it means as much responsibility as freedom of self-determination. The dominant idea, at least in circles of education policy experts, is now that a system of accountability that combines institutional autonomy with strong external checks and feedbacks is the optimal one. The idea, reinforced by the PISA survey, that while autonomy combined with accountability

brings positive results, autonomy without accountability can seriously harm the effectiveness of the system, has become quite widely accepted.

Since the middle of the nineties a number of new measures have been established that have increased the responsibility of schools for their results. After a few years of experimentation, as already mentioned, all schools were legally obliged in 2002 to establish a formal system of internal quality assurance. Although in many schools this has remained a formal process which does not imply a real professional commitment by the majority of the staff, the complex responsibility of every school for the quality of the services it provides is now generally recognised. The already mentioned system of competency measurement is being developed further so that individual schools can become a target of intervention if their results do not reach a certain standard. Leadership is also seen increasingly as a key factor in the quality of the work of the school.

School autonomy is again – as opposed to structural issues – one of those areas where the period of deconstruction has clearly been succeeded by the phase of reconstruction, modernization and stabilization. It has also come close to the phase where things are put together so that the conditions of systemic reform are, perhaps, given. However, systemic reform, consisting of deliberate and coherent actions for making autonomous institutions capable of taking full responsibility for the continuous improvement of the learning of their pupils, has not yet started.

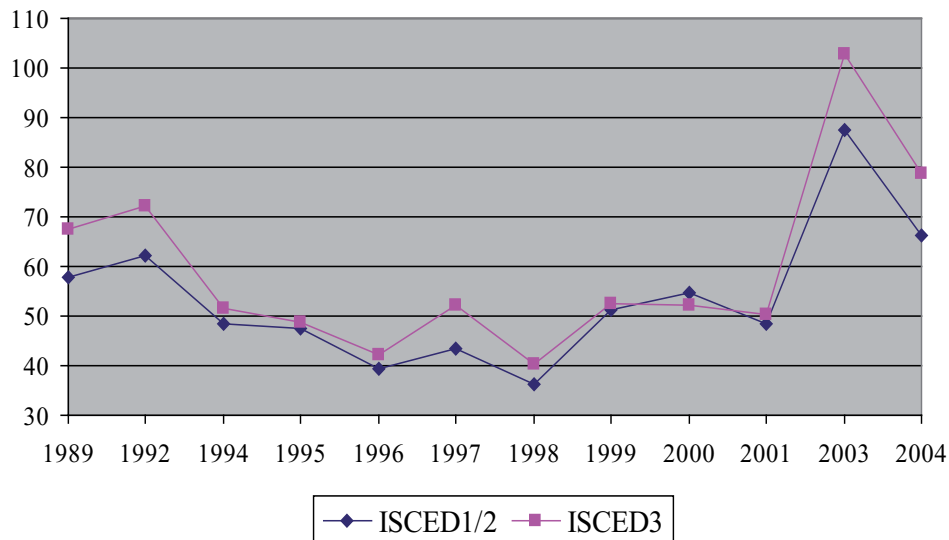
4.2.8. The Teaching Profession

Most teachers (those working in schools maintained by local and regional councils and the state) are public employees. This is a status that is different both from that of civil servants (those who are employed by public authorities) and that of employees working under the jurisdiction of the Employment Law. The national salary scale of public employees determines only the minimum salary for various categories (according to length of service and level of qualification). This means that teachers, in principle, can negotiate salaries higher than the minimum, although – given budget pressures – this happens only in a limited number of schools. The legal employer of teachers is the principal.

During the transformation period public employees, including teachers, were particularly strongly hit by the impact of the economic crisis and especially by the low efficiency of public financing. In 1992, at the deepest point of the transformation crisis, on average they still earned approximately 70% of the salary of employees with a college or university degree, and in the middle of the decade this percentage was less than 50%. In fact the real value of teacher salaries decreased by more than 40% in this period (see Figure 6). In 2002, following the victory at parliamentary elections of the socialists who during the campaign made a pledge of increasing the salaries of public employee by 50%, the gap between teachers and other graduates disappeared, but only for a single year (after the single great leap no further measures were taken to maintain the new balance). The question of this huge salary increase is still heavily debated: as it was not accompanied by any kind

of quality demand or measures for improving labour efficiency, it caused, perhaps, as some claim, more harm than benefit.

Figure 6. Salaries of fully qualified general and secondary school teachers in proportion to the average salary of employees with a college or university degree, 1989–2004 (%)



Source: Education in Hungary..., 2007

The low level of salaries is strongly related to the inefficient use of the labour force in the school system. As already mentioned, in 2004 Hungary employed more than 20% more teachers for 1000 pupils than the OECD average. The decrease in the number of pupils during the nineties was not accompanied by a proportionate decrease in the teacher labour force. For teacher unions preserving all jobs has been a more important goal than increasing the salary of individual teachers. The low cost of the teacher labour force until 2002 did not encourage the authorities to reduce the labour costs of the system. In fact, until recently governments introduced a series of measures that increased the need for labour (e.g. the raising of the age for compulsory schooling, transforming vocational training into a form of full-time education, introducing an extra year for foreign language learning, encouraging parents to keep their children in pre-school education for an extra year etc.).

Although the enlargement of school autonomy, the possibility for every school to establish its own pedagogical profile, the encouragement of innovation and policies stressing the need for more professionalisation demanded a higher level of professional commitment, the life and working conditions of teachers have been working against this. As a consequence the current situation, despite the single great salary increase, can still be described as a negative tacit agreement: "low salary for low quality work". The spiral of increasing quality requirements

and rewarding higher quality work with higher pay has not been put into motion. Teachers have not become supporters of reforms. Although there is an increasing minority of highly committed teachers characterised by high level professionalism and willingness to innovate, the majority is in a state of apathy and do not show any enthusiasm for reforms.

During the last decade many attempts have been made, however, to rouse the rather passive teaching profession. Innovative teachers and schools have had many opportunities to acquire extra resources for financing their initiatives. There were efforts to make the salary scale more flexible and to create possibilities for school leaders to recognise higher performance. Professional organisations have received financial support to finance their activities. The new system of continuous professional training introduced by the 1996 amendment to the Law on School Education, as already mentioned, was designed so that it could be led by the demands of teachers and teaching communities.

The system of continuous professional training deserves particular attention. It consists of several interrelated and closely connected elements which together form a coherent mechanism:

- A guaranteed amount in the state budget for professional teacher development (when the system was established this amounted to more than 1 percent of all public education expenditure)
- State financial support transferred to schools who thus become buyers of training services
- Each school obliged to establish a training plan and use state financial support in accordance with this plan
- Open competition between course providers (every kind of legal person can become a training provider provided it is accredited by the relevant state agency)
- Quality assured by the state accreditation of providers and training programs by a national agency
- Individual promotion of teachers made dependent on participation in training
- The establishment of a national coordination and methodological centre for professional teacher development

As already mentioned, school leadership has recently been recognised as a strategic factor for school development. The principle according to which principals are nominated for five-year terms on the basis of open competition has been applied for several decades, although before 1989 this could have been politically manipulated. The professionalisation of school leadership has been seen, since the early nineties, by many experts as a condition for increased school autonomy to lead to higher performance (Révész, 2007). In the second half of the nineties several universities started providing two-year management courses for school leaders. The 2003 amendment of the Law on School Education recognised the qualification offered by this type of training as a required criterion for the nomination of principals, although only for their second term and with a significant

delay in the legal obligation entering into force.

From a transformation perspective one can state that the teaching profession has not played a clear and coherent role in the educational transformation process in Hungary. While an increasing minority, estimated at between 10 to 30 percent during the last decade, has been a major driving force behind the changes, the majority has never been committed to the reforms. No new social contract could be elaborated and concluded between the larger society and the teaching profession. A relatively large proportion of the profession consists of teachers who are confronted by the daily difficulties of family subsistence. However, the number of those who are actively seeking to improve their own practice and that of their school and who do have a new perspective has probably reached the critical mass that is needed for the sustainability of changes. Regarding the state of the teaching profession, one might be inclined to think that the system has not yet left the deconstruction phase and has not yet fully entered the construction, stabilization and modernization phase. Although the critical mass of teachers who can play the role of engine of construction and reform is already visible, they have not yet become the dominant part of the profession.

4.2.9. Support Structures

Support structures in education have received significant attention during the last two decades in Hungary. There is a widely shared view that quality and development can be sustained in a decentralised system only if schools and teachers have access to a rich supply of professional support. One of the peculiarities of the Hungarian scene is the strong role of private providers in this area. The general model is quite similar to what we could see in the case of the system of continuous professional training of teachers. Private providers play a role in almost all areas of professional support, from training to evaluation through professional advising and research. These providers, mainly small companies of consultants, but also some large ones, have gradually emerged since the middle of the nineties, reinforced by state policies relying on them. The typical mechanism applied in various policy fields by the national agencies has been to make funds available for local councils to buy the services offered by private providers but national agencies also have purchased their services directly.

This started with the creation of the so-called *expert system* in 1993, with the adoption of the Law on School Education. According to this legislation, the evaluation of schools, especially the quality of their pedagogical programs, has become the responsibility of local councils but they could exercise this responsibility only through hiring professionals accredited by the state. When, in the second half of the nineties, schools submitted their pedagogical programs to local councils for approval these latter were forced to hire a high number of accredited experts, most of them offering their services as individual entrepreneurs or small companies, to evaluate these documents. Before this, in the middle of the decade, when local governments were severely hit by austerity measures and were forced to rationalise

their systems, many larger cities contracted specialized consulting companies who monitored their local school systems and made concrete proposals for schools to close or merge. These companies, working for several local councils, acquired significant knowledge of how local educational services could and should be organised in a more efficient way.

At the end of the nineties, when the quality assurance movement started, the state financed directly the activity of those consultant companies which worked together with schools volunteering to build up an internal quality assurance system with external assistance. Some of these companies had previously gained quality assurance experience in industry and they tried to transfer some of the procedures from industry to schools. By the early 2000s, a number of private consultant companies had established pedagogical institutes and had started selling a wide range of support services to schools and their maintainers. After 2004, when financing educational development from EU structural funds started, private providers of education support services could easily compete for these funds and often offered better and cheaper services than public sector agencies.

As for the public agencies that provide support services, their conditions during the period analysed here was characterised by continuous uncertainty and instability. Frequent reorganisations, capricious political demands, budget restrictions and changes in leadership made the working conditions of public support institutions extremely fragile, at both national and local or regional level. Institutional stability could not be established even in areas that enjoyed higher level policy support, for example in the area of evaluation. Although all competent experts seemed to agree that the country needed a national institution responsible for evaluation, and capable of high quality professional work, this idea has never been realised. National level evaluation tasks have been executed by unstable institutions, operating always under severe financial constraints and lacking appropriate leadership.

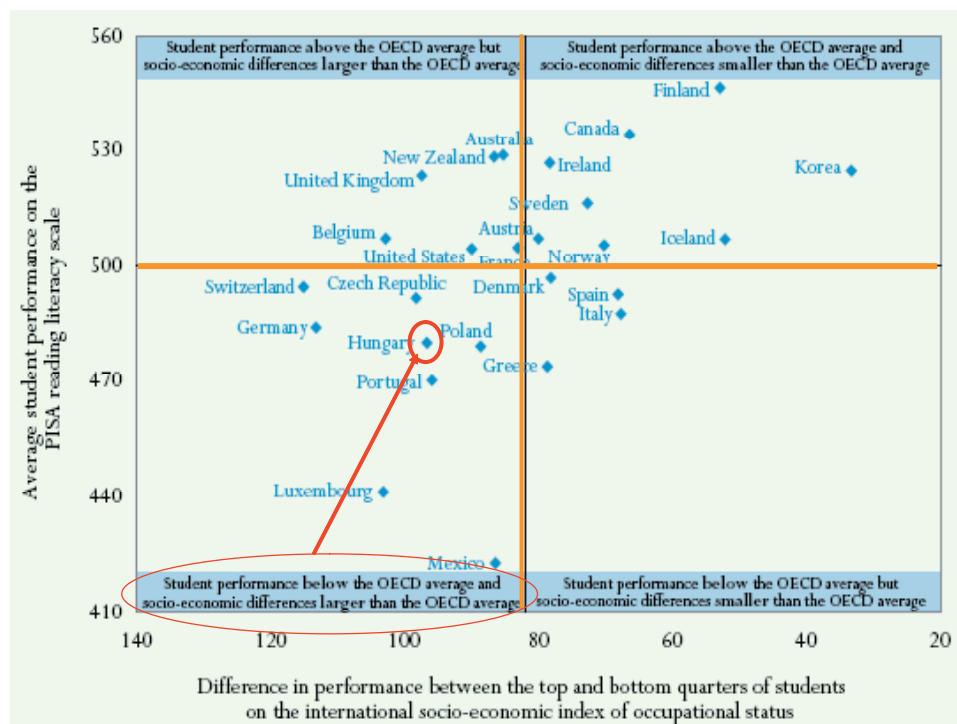
4.2.10. Social Dimension

As mentioned earlier, the social dimension of education was not seriously addressed in the first phase of the educational transformation process: the question of inequalities or equal chances was not in the forefront of education policy discussions. This was partly a reaction to the explicitly egalitarian ideology of the previous political regime, and was linked also with the emergence of new education policy themes that could not be addressed before the change of regime (like, for instance, religious education, or the creation of non-public schools). The first warnings addressed to education policy-makers about the neglected social area were sent from abroad by international organisations: first the OECD and later the European Union. This latter, when its country assessments preparing the accession process started, made it explicit that Hungarian governments should do more for the social integration of the Roma minority. This issue also became a priority of the development program of the Soros Foundation, started in the middle of the nineties. The first governmental measures aimed at improving the

educational situation of the most disadvantaged started in the second half of the nineties. These measures could benefit from the new opportunities opened up by the Phare program of the European Union.

The fact that there are serious problems with the social function of the education system became widely acknowledged after the publication of the results of the first PISA survey in 2001. The PISA survey revealed that the Hungarian system was among those where the social background of families had the strongest impact on the educational achievement of pupils. The country found itself in the group of countries where low achievement was coupled with low-level equity (see Figure 7). It was following this that the government started its first major programs aiming at the social integration of the most disadvantaged groups.

Figure 7. Student performance and socio-economic differences according the PISA 2000 survey



Source: EaG, 2002

Improving equity has become a high level priority of the human resource development components of the National Development Programs financed from EU structural funds since 2004. The integration of pupils with special education needs also has become a major policy goal supported by various concrete measures.

The treating of equity problems is a good example of the consecutive phases of the transformation process. In the first deconstruction phase the issue was

simply neglected: in fact various institutional conditions that aimed earlier at assuring equity were simply destroyed (for instance the unified structure of the school system was discontinued and the vocational sector that had earlier enrolled the most disadvantaged was driven back). In the second phase equity became a policy priority but the various related measures were not yet built into a coherent system. For instance, measures in education, employment and social policy were not connected. It was only in the third phase, within the framework of the National Development Plan negotiated with the European Commission, that the various measures became part of a more or less coherent system. It is still a question, whether this can be seen as a sign of systemic reform.

5. Key Problems and Perspectives

After going through all the areas and all the cases presented in the sections above the key question that this study has to raise is this: is the initial hypothesis of the three succeeding phases of deconstruction, construction (with stabilisation and modernisation) and systemic reform valid? Can we describe appropriately the development and the current state of education in the Visegrád countries, and particularly in Hungary using this hypothesis?

The Hungarian case shows that the term deconstruction is highly relevant as designating the first phase of the transformation process. Although actors in this phase may feel that they are building a new system, in fact, they do not do much more than deconstructing the old one. Their efforts to build up a new institutional environment are extremely poor as they can rely only on general theoretical considerations and follow broad value orientations, since they do not yet have tangible experience of how the new system works and what kind of problems, challenges and difficulties it produces. The real construction process starts only when these problems, challenges and difficulties are faced and the actors are forced to elaborate new viable solutions. All these problems, challenges and difficulties bring instability and lower the feeling of security of key actors. Previous patterns, tried and tested solutions may appear extremely attractive in this phase. But turning back to what has already proved to be unviable cannot lead to stability. Stabilisation starts when the key players become capable of elaborating new solutions. However, the devising of new solutions, stabilising the new situation through these solutions and even successful modernisation efforts do not necessarily lead to systemic reform. This last requires something more that is probably not yet in position, at least not in the Hungarian case.

Systemic reform, that is, a rich set of actions, measures and policies that push in a coherent way the system of education towards more quality, more equity and more built-in adaptive capacity requires a higher-level political capacity than the education system in the Visegrád countries probably has, and certainly than the system in Hungary has. In spite of the huge number of changes, actions and piecemeal reforms, there are a number of crucial issues that have not yet been addressed appropriately. The financial efficiency and sustainability of the system

is certainly one of these. Any successful partial reform measure achieved within a financially non- sustainable system may only conceal the fundamental problem: the basic structural features of the system cannot survive. Another great unsolved problem is related to the teaching profession. All the modernisation efforts remain only on the surface if a critical mass of the teacher profession has not identified itself with it, and – what is also particularly important – this critical mass is not yet capable of making a critical impact. Has the critical mass been reached? Probably, yes. But it certainly is not yet capable of determining the dominant education policy discourse. There are still too many teachers who see the construction of the elements of the modern educational system as having no connection with their daily practice and daily difficulties, and their voice is still dominating the narrative of the profession.

At the time of writing this study Hungary, together with the other Visegrád countries, is in the process of finalising the planning of how to use European structural funds for modernising its education system. Within the framework of the EU-funded national development programs for 2007-2013, an unprecedented amount of resources will be available for reforms, which may become a tremendous force pushing the system towards systemic reforms. In view of the fact that beyond the resources provided within the EU-funded national development programs no further domestic resources will be available for reforms, this is the only potential force that may put a systemic reform into motion. However, as the clarity and the tangibility of the European reform goals are still far from what would be needed for laying the foundations of a real systemic reform in the education sector, and as the national (domestic) impact of community education policies is still very weak, this external force is not enough to trigger an authentic national systemic reform. As systemic reforms are becoming unbreakably linked with europeanisation, only the progress of the latter may create appropriate conditions for the former. Thus, one of the main conclusions of this study is that the shift from the second phase of transformation (construction, stabilisation and modernisation) to the third phase (systemic reform) cannot be detached from europeanisation. This shift is or will be strongly conditioned by the nature and the quality of the process of europeanisation.

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EDUCATIONAL RESTRUCTURING AND CHANGE: POST-COMMUNIST EDUCATIONAL TRANSFORMATION IN POLAND

ANDRZEJ JANOWSKI

Abstract: *This study provides an overall picture of educational transformation in Poland since the political changes in 1989. The transformation process in Poland is analyzed in accordance with a common theoretical framework distinguishing three phases of transformation: (1) deconstruction, (2) reconstruction/modernization/stabilization and (3) systemic reform. The process of transformation is analyzed in terms of ten specific areas, including, among others things, curriculum, structural changes, teachers, the social dimension. It is argued that the changes introduced in the reconstruction phase of the transformation were more important and powerful than the structural reform introduced in 1999. In the last part, the recent initiatives of an ultra-conservative minister of education, Roman Giertych, are commented upon.*

Key words: *Poland, educational transformation, educational system, educational policy, dimensions of transformation, systemic reform, civic education, NGOs in education*

1. Basic Information on the Country

Official name. The official name of the Polish Republic is Rzeczpospolita Polska, "rzeczpospolita" being the Polonised version of the Latin *res publica*. Poland is a parliamentary republic and Warsaw is the country's capital.

Main turning points of history. The beginning of the Polish state is associated with the dynasty of Piast at the end of the 10th century. In 966 Mieszko I, a member of this dynasty, was baptised and brought Christianity to the country. The Piasts united the lands which roughly resembled the present territory of Poland. During the following centuries the Polish Commonwealth (Poland united with Lithuania) expanded eastwards and ruled over vast territories situated between the Baltic and Black Seas. In the 17th and 18th centuries Poland became involved in long wars which weakened the country while neighbouring Russia, Prussia and Austria were increasing their political power. This led to the partitions of Poland during the last decades of the 18th century. Efforts to regain independence in the 19th century were fruitless. Poland emerged again as an independent state after WWI in 1918. In September 1939, the invasion of Poland by Germany started WWII. In 1945 Poland, liberated by Soviet troops, fell under communist rule. Authoritarian rule led to a growing opposition which culminated in the formation of the Solidarity trade union in 1980. In 1981 martial law was imposed and for many years Solidarity became an underground movement. In 1989, after the so called "round table" negotiations, the

first partially free parliamentary elections took place. A dynamic period of political and economic transformation began.

Institutions of the democratic state. The functioning of the Polish State is defined by the Constitution of 2 April 1997. The legislative power is exercised by the Parliament (Sejm) and the Senate (Senat). The Sejm is the lower chamber of the parliament and consists of 460 members elected according to a proportional representation system for a 4-year term. The Sejm supervises the government. The Senat, the upper chamber, consists of 100 members.

The executive power is exercised by the President and the Council of Ministers. The President, who is the head of the State and protects its sovereignty, is elected by the nation for a 5-year term.

Political parties in the first half of 2007 – the ruling coalition: Prawo i Sprawiedliwość “Law and Justice”, Samoobrona “Self-defence”, Liga Polskich Rodzin (the League of Polish Families). The opposition: Platforma Obywatelska, (Citizens Platform) Sojusz Lewicy Demokratycznej (the Alliance of Democratic Left). In August 2007 the coalition collapsed, at present only “Law and Justice” rules, the parliament stopped to exist. The general election will take place on October 21th.

Inhabitants. Poland covers 312,685 square kilometres and has a population of 38.18 million. 61.5% of Poles live in towns and urban areas and 38.5% inhabit rural areas. From the year 2002 we have seen a natural decrease in the population. In the year 2005 there were 9.7 deaths to every 9.6 live births per 1,000 inhabitants. The official language is Polish. Poland is very homogenous as regards nationality; it is estimated that no more than 1,500,000 people are members of national minorities: German, Byelorussian, Ukrainian, Slovak, Lithuanian, Romany as well as the ethnic minority of Kashubian. The situation of nationalities is unclear because it is estimated that ca. 1,500,000 Poles left Poland after 2004 (for an undefined period or for ever?) and moved to Western Europe. Approximately the same number of persons arrived from the countries of the former Soviet Union and Vietnam and they now work in Poland’s shadow economy. Religion: Poland is predominantly Roman Catholic (about 35.8 million baptized). The Catholic church also includes the Uniate Church (Greek-Catholic) with a congregation of ca. 82,000. Other religions and denominations are represented by a large number of relatively small communities. Among them the biggest are: Orthodox – 510,000, Protestant and related – 140,000, Jehovah witnesses – 126,000 and Old Catholic – 50,000.

Economic characteristics. After the collapse of the socialist form of enterprise we are witnessing in the present decade the steady growth of GDP, which in percentage terms was +5.4 in 2004, +3.2 in 2005, +5.8 in 2006. At the end of 2006 the rate of unemployment was 14.9% and average annual inflation 2.1% (2005). In June 2006 the rate of unemployment within the 25-34 age cohort was 27.9% – a reason for emigration from the country.

International context. In 1991 Poland became a member of the Council of Europe, in 1996 a member of the OECD and in 1999 of the North Atlantic Treaty Organisation (NATO). On 1 May 2004 Poland became a member of the European Union.

2. Educational System: Actual Situation 2005 – 2006

2.1. Pre-primary Education

Pre-primary education is regarded as the first level of the school system. It concerns children from 3 to 6 years of age. As of 2004/05, 6-year-old children are obliged to complete a year of preparation for primary education called "0 grade". The classes are attached either to kindergartens or primary schools.

2.2. Compulsory Education

There are 3 phases of compulsory education:

Klasa zerowa ("0 grade") for 6-year-old children

Szkoła podstawowa (6-year primary school) for children 7-13 years of age. This school is divided into 2 stages:

stage 1 – integrated teaching, 7-10 years of age;

stage 2 – teaching based on separate subjects, 10-13 years of age.

Gimnazjum (3-year lower secondary school) 13-16 years of age

stage 3 – teaching based on separate subjects.

2.3. Post-compulsory Education

(upper secondary and post secondary level)

There are 7 types of schools in upper secondary and post secondary education

- Liceum ogólnokształcące (general upper secondary school) 16-19 years of age
- Liceum profilowane (specialized upper secondary school) 16-19 years of age;
- Technikum (technical secondary school) 16-20 years of age;
- Zasadnicza szkoła zawodowa (basic vocational school) 16-18/19 years of age;
- Uzupełniające liceum ogólnokształcące (supplementary general secondary school) 18/19-20/21 years of age;
- Technikum uzupełniające (supplementary technical secondary school) 18/19-21/22 years of age;
- Szkoła policealna (post-secondary school) 19-21 years of age (very rarely 20).

The school year is divided into two semesters. It comprises around 185 days between September and June.

2.4. Higher Education

There are state and non-state (private) higher education institutions. The final examination certificate at the end of upper secondary school (świadectwo dojrzałości) is required by all institutions for admission to higher education. Additional admission requirements depend on the type of institution or faculty.

The first cycle studies (higher vocational education) last from 3 to 4 years and finish with the vocational qualification diploma and the title of licencjat (equivalent to BA) or inżynier (engineer) which give access to the job market or to extended higher education (the second cycle studies) and to obtaining the title of magister (MA) or its equivalent. After obtaining an MA diploma one can apply for doctoral studies – the third cycle of studies. One can learn using the form of full-time or extramural study.

3. Transformation of the Educational System 1989 – 2006

3.1 The Process

Deconstruction

As the first non-communist government of Prime Minister Mazowiecki had already taken over the responsibility for education in 1989 it was obvious which relics of the past needed to be overcome. It was necessary to:

- increase the percentage of youth graduating from secondary schools, which awarded diplomas allowing the students to go on to tertiary education,
- introduce new ideas into the teaching of humanities, particularly history, which had been especially falsified;
- draw up and implement a civic education programme,
- increase the scope of foreign language teaching,
- analyse and determine the new role of vocational training.

The demands for specific changes were at the beginning of the transformation based on the ideas of especially active groups of teachers – mostly teaching in secondary schools in big cities – as well as on documents prepared six months earlier for the “round table” negotiations by Zespół Oświaty Niezależnej (Association for Independent Education, part of Solidarity) which was secretly active between 1982 and 1989. Some deemed the demands for the eradication of communist relics “a return to normality”.

During those first years (1989-1991) it was natural for the new educational system to define itself in terms of negating whatever the communist authorities had been promoting, and it could not have been otherwise. For decades cut off from educational debates going on in the West as well as from trends which could be found there, it was difficult for us to imagine what new perspectives the development of our educational systems offered.

Reconstruction, Modernization, Stabilization

Between 1990 and 1999, when the structural reform of the educational system was underway, there took place many events which, in modernising education, prepared the ground for more radical changes. Among them, the following should be considered in more detail:

1. The appearance of educational NGO's which resulted in schools being opened that were named "civic" or "social". These schools were in fact non-profit-making private schools, created by groups of teachers or teachers and parents. They had a notable influence on the educational programme and methods. Many parents became involved in the creation of learning conditions which they believed to be more suitable for their children. Somewhat later private for-profit schools also appeared.

2. The Parliament's passing of the Act of 12 September 1990 on Schools of Higher Education, which enabled private colleges and universities to be established. This had a big influence on tertiary education, raising young people's aspirations and – what became apparent a few years later – causing a previously unheard of (and quite unexpected) rise in the number of people graduating from tertiary education institutions. Between 1990 and 2005 the number of college and university students increased almost fivefold.

3. Intensive actions aimed at the development of foreign language teaching. Widespread knowledge of foreign languages was considered a priority of the educational system as early as at the end of 1989. According to our estimations, we needed ca 25,000 teachers of English and the demand for teachers of German and French amounted to about 8,000 each. Therefore, in the first half of 1990 we prepared a programme of foreign language teacher training in a new type of school – the Foreign Language Teacher Training College. During 1990 and 1991, 55 colleges opened all over Poland, mainly in towns in which there did not exist institutions of tertiary education. In 1990, Polish universities offered only traditional "philological" training. Three-year colleges were the first attempt to prepare foreign language teachers in a modern way.

4. In September 1990, there came into existence a legal framework for the teaching of religion in primary and secondary schools. The decision as to whether a primary school student was to participate in religion classes was left to the parents and in the case of secondary school students – to the students, who nonetheless had to have their parent's approval. During the classes no grades were to be given. For students not participating in religion classes, ethics classes were to be introduced.

5. The Parliament's passing of the Education System Act of 7 September 1991, which ordered the entire matter of primary and secondary education.

6. The possibility of using other countries' educational experience – consent was given for the creation of Waldorff or Montessori-type schools or schools within the "The International Baccalaureate" system;

7. Introduction of changes in the education and training of teachers – taking into account the experience of other countries;

8. The undertaking of intensive actions aimed at introducing computers and the Internet into schools; especially important for the development of education was the initiative undertaken by the Sejm in the 1990s, aimed at providing each Polish school with internet access.

9. Making it possible to create "integrated or inclusive schools", in which

handicapped children and so-called regular children study together;

10. A large increase in the number of students applying to secondary schools awarding the "matura" diploma and, resulting from this, a decrease in the number of students wanting to study at secondary vocational schools (which did not award the diploma). The vocational schools had mostly been connected with large socialist industrial plants, awaiting their own transformation.

11. The abolition of the state's monopoly in creating the curriculum and the fact that many institutions and economic entities were now allowed to create and publish school books and teaching materials. Before 1989, there existed one institute authorised to create the curriculum and one state-owned publishing house authorised to publish school books. In the 1990s, this could be done by groups of teachers, educational institutions, private publishing houses, etc. In 1991 the Ministry of Education stopped publishing official curricula, and instead formulated for each subject the so-called core curriculum, i.e. the basic assumptions concerning each taught subject. As long as he/she took into account the core curriculum, each author could create his/her own curriculum and textbook. The procedure of making textbooks available to be used in schools was not very complicated and it was easy to attain the Minister's approval.

12. A gradual handing over to local, district and regional authorities of the power to run schools and educational institutions and, connected with this, the long – and far from finished – process of those authorities' learning how to develop and shape local educational policies. The communes (gminy) took over the responsibility for running primary and 3-year lower secondary schools, while districts (powiaty) took over the responsibility for higher secondary schools.

13. The increase in the importance of the principal and the school teachers. The appearance of the opportunity to create a type of local educational plan at each school, making it possible to take into account the particular needs of the environment in which the school operates. The enabling of teachers in public schools to implement their own "individual" curricula.

14. The appearance of the possibility for schools to take into account the needs of the region as well as needs connected with the pupils belonging to a specific ethnic group (e.g. teaching the Kashubian language and cultural heritage in kindergartens and schools has only been possible since 1990). Also in the 1990s there appeared the possibility of original curricula which encompass knowledge of the region.

15. A sudden development of different new non-government organizations, very active in the field of education; they realize many important tasks with minimal (or without any) support from local or national governments. Many social organizations and NGOs have more and more to say when it comes to education (e.g. the role of the Centrum Edukacji Obywatelskiej (Centre for Civic Education) or the „Edukacja dla demokracji” (Education for Democracy Foundation). In my view the development of these organizations is more important for education than some ministerial reforms.

16. The development in recent years of a movement aimed at protecting small schools. Due to demographic changes, the number of students in many villages

has significantly diminished. As a result, the district authorities have often decided that some schools must be shut down. There appeared the tendency to protect these schools, because the fall in the number of students could be seen as creating an opportunity to greatly improve the teaching conditions, introducing a more individualized approach to the pupils, etc. The movement itself has an influence on the awakening of a social responsibility for the children's education.

As can be seen, most of the achievements in the scope of the development of education do not result from planned „constructivist” activities, but rather from the abolition of limitations, which had hindered people's freedom to take the initiative.

Systemic Reform

Until 1998/99, there existed an 8-year primary school, after which students could continue their education in a 4-year general secondary school, a 4- or 5-year technical secondary school, a 4-year general vocational school or a 3-year basic vocational school. In 1999, a reform was introduced in compliance with the Act of 8 January 1999 on the Implementation of the Education System Reform. Since 1999/2000, students have first gone to 6-year primary schools, then to a 3-year gimnazjum (lower secondary school) which – like the primary school – is compulsory, and afterwards either to a 3-year specialized upper secondary school or to a 2-year vocational school. In November 2001 it was decided that old-type schools, such as technical upper secondary schools and general upper secondary schools, would still function but their educational cycle would be reduced by one year. 2- or 3-year basic vocational schools were also reactivated, graduates of which could take an exam confirming their vocational qualifications and, after finishing a 2-year supplementary general secondary school or a 3-year supplementary secondary technical school, could take the “matura” examination.

According to the plan for school reform the following three main areas of the education system were to be the targets of the new system:

Raising the level of society's education by developing high and higher education: this target was to be achieved by introducing 'gymnasia' and prolonging the period of compulsory schooling by one year, and also by creating a new type of high school with a professional profile.

Creating equal educational opportunities for all children and teenagers: the obstacles which do not let some students get well educated (parents' economic status and their level of education, place of living, disability) were to be overcome by a system of scholarships and by creating better conditions for integrating students with SEN.

Improving the quality of education: this included changing the curricula, preparing the graduates both for adult life and for permanent self-education. The new curricula were created so as to provide each graduate with the basic skills necessary for further learning, interpersonal communication, teamwork, a creative attitude towards problem-solving, good command of computer programmes and foreign languages.

3.2. Particular Dimensions of Transformation

3.2.1. Aims and Functions of Education

The basic principles of the Polish education system are included in the Education System Act of 7 September 1991. Education is defined as part of “the common welfare of the whole of society”. It should be guided by the principles contained in the Constitution and by instructions contained in universal, international legislation and conventions.

In particular, this system should provide a fulfilment of the right of each citizen in the Republic of Poland to learn; the right of children and young people to be educated and cared for; support provided by schools to back up the educational role of the family; the possibility for various entities to establish and run schools and institutions; the adjustment of the contents, methods and organization of education to pupils’ psycho-physical abilities, and the possibility of availing oneself of psychological assistance; the possibility for disabled and maladjusted children and young people to learn at all types of schools and for general access to secondary schools.

Key legislative documents are:

- The Education System Act of 7 September 1991;
- The Act of 8 January 1999 on the Implementation of the Education System Reform;
- The Act of 26 January 1982 – Teachers’ Charter;
- The Act of Higher Education of 27 July 2005 replacing the Act of Schools of Higher Education (1990) and the Act on Higher Vocational Schools (1997).

3.2.2. System of Educational Management and Administration

The main role in initiating and exercising control over current and long-term educational policy is played by the Minister of National Education.

Through its members in the Education Committee, the *Sejm* [Lower Chamber of the Parliament] may present its proposals and initiatives, although, in the majority of cases, the Committee works on materials that have originally been prepared by the Ministry of National Education. The Parliament is responsible for the final version of legal acts that determine the orientation of educational policy and the amount of money earmarked for education.

Teachers’ Unions have a considerable role in shaping current educational policy. The Minister for Education is obliged to consult Teachers’ Unions on the most important decisions, and in certain cases he must have their approval.

The Ministry of National Education is responsible for nearly the whole system of education. Vocational schools, which in the past were run by other ministries, are now the responsibility of the Ministry of National Education. At present only art schools, as well as correctional institutions are under the supervision of the Ministry of Culture and the Ministry of Justice, respectively.

The national educational policy is developed and carried out centrally, while the

administration of education and the running of schools, pre-school institutions and other educational establishments are decentralised. The responsibility for the administration of public nursery and primary schools (and since 1999/2000 also 'gymnasia') has been delegated to local authorities (communes). It has become the statutory responsibility of *powiaty* (districts) to administer upper secondary schools, art schools and schools for children with SEN. The provinces (voivodships) have a co-ordinating function, supervising the implementation of the policy of the Ministry and being responsible for pedagogical supervision.

Central Level

The Minister of National Education co-ordinates and carries out the state education policy, and is partly responsible for supervising the work of education superintendents (*kuratoria*).

The Minister determines the timetables, core curricula, conditions and procedures for the approval of curricula, textbooks and teaching aids. He/she is responsible for the rules for assessing and promoting pupils and for conducting tests and examinations. He/she determines the required standards for tests and examinations, and the rules and conditions for implementing innovations and experiments by schools. He/she is also responsible for the organisation of the school year and for the procedures concerning the organisation of psychological and pedagogical support in schools.

Regional Level

The regional level in Poland is the level of 'voivodship'. The number of voivodships is 16. The education superintendent (*kurator*) is the chief educational body at regional level. He/she is responsible for general administration of education in a voivodship. He/she is appointed by the head of the province, the 'voivode'. The education superintendent implements the policy of the minister of education. On behalf of the voivode, the superintendent is responsible for pedagogical supervision over public and non-public schools.

District Level

The district level in Poland is the level of '*powiat*' (an intermediate administrative unit between the voivodship and the commune). There are 379 districts now.

The districts exercise administrative control over upper secondary general and vocational schools, as well as over post-secondary schools and public special schools. They are also responsible for the management of art schools, sport schools, lifelong education centres, psychological and pedagogical guidance centres, and out-of-school education centres.

Local Level

The local level in Poland is the level of the commune (*gmina*). In 2004 there were

2,478 communes, most of which were rural ones. Communes exercise administrative control over pre-school institutions, primary schools and lower secondary schools called a "gymnasium" (Nota bene: "gymnazjum" in Poland is a mainstream school for all children – it is not a school for the academically gifted as in Germany or Czech Republic.) Pedagogical supervision is excluded from their tasks - it is the responsibility of the education superintendent (*kurator*).

Educational Institution Level

School heads are recruited on the basis of an open competition and employed by the school governing body for 5 years. In justified cases this period may be shortened, but not to less than 1 school year. In consultation with the school governing body, the school head appoints and dismisses his/her deputy and other executive staff, if those posts are in accordance with the statute of a school.

The school head manages the school (institution) and functions as its ambassador to the outside world, takes care of the pupils and provides the conditions for their harmonious psychological and physical development, applies the resolutions of the school council or the teachers' council, has budgetary control and is responsible for the proper use of school finances, and co-operates with higher schools and teacher training institutions in the field of organising teacher pedagogical training.

The school head, being the manager of the institution, decides also on the employment and dismissal of teachers and non-teaching staff and on assessing the performance of teachers.

3.2.3. Financing of the School System

In 2004 public spending on the whole system of education (with higher education included) was estimated at 5.4% of GDP. In 2005 public spending on primary and secondary education (without higher education but with post secondary schools included) was equal to 4.1% of GDP.

All educational tasks carried out by the three levels of local government are financed within the framework of a general subsidy from the State Budget. In the year 2000 a uniform system of allocation of funds, using the algorithmic formula based on the number of pupils, was adopted. This formula is based on the real number of pupils, adequately increased by the system of weightings (taking into account specific conditions, i.e. rural areas, as well as specific educational tasks, i.e. the presence of SEN pupils, integration of SEN pupils into mainstream education, vocational training, sports schools).

The local government unit, as a body running or subsidising the school, is responsible for the designing of a budget programme (i.e. a plan of expenditure) for all schools and educational institutions in its respective area.

Educational investments are a local government responsibility, although they can be co-financed from the State Budget through the voivodship authorities.

3.2.4. Structure of the Educational System

Pre-school Education

A child aged 3 to 6 may receive pre-primary education, which is not compulsory, but the majority of six year-old children attend either kindergartens or pre-primary classes attached to primary schools.

Pre-school education in Poland underwent certain changes caused by a decrease in the number of pre-school children and by the partial introduction of fees into this type of educational institution. In 1995 the attendance rate was calculated as 46.2% of children aged 3 to 6 and in 1998 as 49%. In the school year 2003/2004 52.3% of 3 to 6 year olds attended pre-school institutions.

Public kindergartens are administered and financed by local governments – communes. Parents' payments cover children's meals, extra lessons, and a so-called extra fee if a child attends the kindergarten for more than 5 hours a day.

According to the Education Act of 1991, pre-school education is treated as the first level of the education system in Poland. Starting from the school year 2004/05 children aged 6 have been obliged to complete the "zero year" either in a kindergarten or in a pre-primary class attached to a primary school.

The main goal of pre-primary education is to support and stimulate the child's development. Education of a 6-year-old includes teaching primary reading skills and basic mathematics. In the school year 2003/2004 97.7% of 6 year-olds attended pre-schools or 0 grade classes at schools. The kindergarten is obliged to provide unpaid teaching and nursing for at least 5 hours a day – the time necessary for the implementation of the content included in the Core Curriculum for Pre-School Education. The majority of pre-school institutions work for 9 hours a day. The number of children in one section cannot exceed 25. In the case of integration-based and other special pre-school classes the limits are lower (15-20, among which 3-5 are SEN children). The main criterion used for grouping children is age. Grouping together children of a different age is also justified in certain circumstances.

Compulsory Education

Full-time compulsory education starts during the calendar year in which the child reaches 6 years of age. Six-year-old children are obliged to complete a year of preparation for primary education called "0 grade". Compulsory education lasts 10 years, normally continuing until the pupil is 16 years of age, but in no case continuing beyond the age of 18 years. It covers education in the zero grade, 6-year primary schools (*szkoły podstawowe*) and 3-year lower secondary schools (*gimnazja*). Part-time compulsory education, however, in school or out-of-school classes, lasts until 18 years of age (based on the Constitution of the Republic of Poland adopted in 1997). Compulsory education is free of charge for all pupils.

Primary Education

From 1999/2000 children between the ages of 7 and 13 have been attending new primary schools for a period of 6 years. Admission is based on age. The general objectives of the primary school are formulated as follows: to develop in children the ability for self-expression, reading and writing, the ability to solve arithmetical problems, the ability to use simple tools, to develop habits of social life, to develop cognitive abilities enabling understanding of the world, to develop conscious motivation to prepare for undertaking tasks requiring systematic intellectual and physical effort, to develop the aesthetic and moral sensitivity of children and their creative abilities.

The organisation of the school year is defined by the Ministry of Education. The Ministry issues the calendar, specifying the dates of the start and the end of the school year and school holidays. The school year is divided into two semesters.

Classes are organised by age, by subject or by level of competence (more and more often FL teaching classes are subdivided).

Teachers are free to choose teaching materials, depending on the finances of the school. They also choose textbooks, from the list approved by the Minister of National Education.

Compulsory Secondary Education (*Gimnazjum*)

In the school year 1999/2000 a new type of school, i.e. the *gimnazjum*, was established. This school constitutes a lower secondary level. The only admission requirement is successful completion of the 6-year primary school and attainment of the primary school leaving certificate.

The main objectives are formulated as follows:

- to introduce the pupil to the world of science by means of teaching the language, concepts, theories and methodologies characteristic of a given discipline at a level facilitating further education;
- to arouse and develop individual interests;
- to introduce the pupil to the world of culture and arts;
- to develop in pupils social skills and abilities through creating possibilities of experience through co-operation within peer groups.

The organisation of the school follows the example of primary education.

Post-compulsory Education – General Upper Secondary and Vocational Schools

The upper secondary education covers the age group 16 to 18 or 19/20. In the reformed post-gymnasium education the following schools have been operational since the school year 2002/03:

- *liceum ogólnokształcące* (3-year general secondary school) offering 3 years of full-time general upper secondary education for students aged 16 to 19. It offers the *Matura* examination necessary for admission to higher education.
- *liceum profilowane* (3-year specialised secondary school) - new institution

established in 2002/03 offering 3 years of full-time general and specialised upper secondary education for students aged 16 to 19. It offers the *Matura* examination necessary for admission to higher education.

- *technikum* (4-year technical secondary school) - institution offering 4 years of full-time technical and vocational upper secondary education for students aged 16 to 20. It offers the *Matura* examination necessary for admission to higher education.
- *zasadnicza szkoła zawodowa* (2 to 3-year basic vocational school) - institution offering 2 to 3 years of full-time upper secondary vocational education for students aged 16 to 18. The leavers have access to a trade or occupation or to the *liceum uzupełniające* or *technikum uzupełniające*.

At the levels of upper secondary and post-secondary education in Poland there are also the following types of institutions:

- *uzupełniające liceum ogólnokształcące* (2-year supplementary general secondary school) – a new institution introduced in 2004/05 offering 2 years of full- or part-time general upper secondary education for students aged 18 to 20 in preparation for the *Matura* examination. This school is meant for those leaving the 2/3-year vocational school.
- *technikum uzupełniające* (3-year supplementary secondary technical school) – a new institution introduced in 2004/05 offering 3 years of full- or part-time vocational upper secondary education for students aged 18 to 21 in preparation for the *Matura* examination. This school is meant for those leaving the 2/3-year vocational school.
- *szkoła policealna* (maximum 2.5-year post-secondary school) – this institution enables people with secondary education to obtain a vocational qualification in the form of a diploma upon passing an exam.

Upper secondary schools are non-compulsory and mostly coeducational. There are also a small number of single-sex schools within vocational and professional education. Public (state) schools are free of charge. The main objective of general upper secondary education is to prepare youth for admission to higher education establishments of various types. The objective of vocational upper secondary education is to prepare youth for the world of work. The organisation of school time is arranged according to the same rules as those established for primary schools.

Post-secondary Vocational Education

Post-secondary schools (*szkoły policealne*), are included as part of secondary education in the Polish classification and assigned to level 4 in the ISCED. Post-secondary schools admit first of all graduates of general upper secondary schools. Most of them require only a secondary school leaving certificate, not the *matura* certificate.

Post-secondary schools prepare students for work in blue-collar and equivalent occupations or in occupations and specialities that require secondary vocational

qualifications. The period of instruction varies. For the majority of occupations it is two or two and a half years, for some only one year.

Students in these schools are trained as nurses, accountants, administrative personnel for enterprises and hotels, computer specialists or librarians. Those who complete a course of study for a blue-collar occupation receive the title of qualified worker. Those who have completed a two- or two and a half - year course of study receive the title of technician or equivalent.

Private Schools

In line with the Education System Act of 1991, schools can be of two types: public (state) schools, which offer free education within the framework of the core curricula, and non-public. The latter can be civic (social), church or private schools. The schools are called "social" or "civic" because they are non profit-oriented and because of the huge amount of work that is invested in them by people from local social groups – mostly parents and teachers. All these schools may have their own curricula, which are approved by the minister of education. They are financed by fees received from parents. Non-public schools with the rights of public schools are eligible for a grant calculated according to the number of pupils, which equals 100% of the average cost of educating a pupil in a public school. Non-public schools in Poland have the right to issue school certificates that are recognised by all other schools and by the universities.

Most non-public schools have small numbers of pupils and small classes. They may be distinguished from the public schools by their personalised teaching programmes, by a wider range of curriculum choice and by a higher standard of foreign language teaching.

Non-public primary school pupils make up 1.7% of the total number of pupils attending primary schools, pupils in non-public lower secondary schools make up 2.3%, non-public general upper secondary school pupils about 3.8% and non-public vocational secondary and basic vocational school pupils - 1.8%.

3.2.5. Curriculum, Curricular Policy and Development

Pre-school Education

There are three sets of curricula (prepared on the basis of the core curriculum) approved for pre-school education. Two of them concern children aged 3-6, one deals with six year-olds only. Kindergartens and pre-school classes attached to primary schools are obliged to follow one of these curricula. Pre-primary teachers can write so-called "authors' curricula", always based on the national core curriculum.

The core curriculum for pre-school education comprises the basic objectives and the teacher's tasks set within a framework of 4 educational areas. The following areas of activities have been defined: acquisition of knowledge and understanding of oneself and the world, acquisition of skills, finding one's place in the peer

group and community, construction of a system of values. There are no official recommendations with respect to the methods. A pre-primary school teacher has the right to choose the most suitable ones.

Primary Education

The scope of primary education is determined by three elements: the core curriculum, outline timetables and requirement standards. Core curricula have to be respected by each school.

Education in the 6-year primary school is divided into 2 stages: stage I – grades 1 to 3, called integrated teaching and stage II – grades 4 to 6.

The teaching at stage 1 is meant to provide a smooth transition from pre-primary to school education. Educational activities are conducted according to a flexible timetable prepared by the teacher

During this stage the number of teaching hours per week for a period of 3 years is 72 (52 hours of integrated teaching, 6 hours for religion/ethics and 12 hours left to the school head's discretion).

The school governing body is allowed to increase the number of compulsory teaching hours by a number not exceeding 3 hours per week for one grade in one school year. However, the weekly number of compulsory teaching hours, as well as religion/ ethics classes and additional classes, cannot exceed a maximum of 23 hours in grades 1 to 3.

Stage 2 of the primary school covers grades 4, 5 and 6. Teaching at this stage is arranged by subjects listed in the outline timetable (Polish language, History and Civics, A Modern Foreign Language, Mathematics, Natural Science, Music, Art, Technology, Computer Science, Physical Education, Religion/Ethics).

In addition to the particular subjects, the following cross-curricular themes have been introduced at this stage: health education, ecological education, reading and media education, education for society, education for family life, cultural heritage of the region and patriotic and civic education.

The school head is responsible for the inclusion of the cross-curricular themes in the school curriculum. During this stage the number of teaching hours per week over a period of 3 years is 87 (72 hours of subject teaching, 6 hours for religion/ ethics and 9 hours left to the school head's discretion).

On the basis of the outline timetable, the school head develops the school timetable, divided into school years. The school governing body is allowed to increase the number of compulsory teaching hours by a number not exceeding, 3 hours per week for one grade in one school year. The weekly number of compulsory teaching hours, as well as religion/ ethics classes and additional classes, cannot exceed a maximum of 28 hours in grades 4 to 6.

Teachers have the right to choose forms and methods of teaching. They are also free to choose textbooks from the list approved by the Minister.

Gimnazjum

According to the core curriculum for the *gymnasium* the teaching at this stage is arranged in subjects, listed in the outline timetable (Polish language, History, Civic Education, A Modern Foreign Language, Mathematics, Physics and Astronomy, Chemistry, Biology, Geography, Fine Art/Music, Technology, Computer Science, Physical Education, Lessons with the Class Tutor, Religion/Ethics).

Beside separate subjects, the following cross-curricular themes (named "pathways") have been introduced at this stage: philosophical education, reading and media education, health education, ecological education, regional education – the cultural heritage of the region, European education and Polish culture in the context of Mediterranean civilisation.

The school head is responsible for the inclusion of these pathways in the school curriculum. At this stage the number of teaching hours per week over a period of 3 years is 94 (82 hours of subject teaching, 6 hours for religion/ethics and 6 hours left to the school head's discretion).

The school governing body is allowed to increase the number of compulsory teaching hours by a number not exceeding 3 hours per week for one grade in one school year. The weekly number of compulsory teaching hours, additional teaching hours and religion/ethics classes cannot exceed a total of 31 hours in all grades of the lower secondary school. Subject teachers have the right to choose methods of teaching.

Upper Secondary Schools

Core curricula for general education in all types of upper secondary schools are included in the Annex to the Regulation by the Minister of National Education of 26 February 2002.

They are divided by subjects: Polish language, A Modern Foreign Language, Latin and Ancient Culture, Mathematics, History, Civics, Geography, Biology, Physics and Astronomy, Chemistry, Technology, Information Technology, Art, Music, Self-Defence Training, Physical Education, Ethics (optional), Philosophy (optional), Education for Family Life, Cultural Studies, Entrepreneurship, A Minority Language.

Besides separate subjects, the following cross-curricular themes have been introduced in the general upper secondary school, in the upper secondary specialised school and in the upper secondary technical school: reading and media education, ecological education, European education, philosophical education, health education, regional education – cultural heritage of the region, preparation for family life.

In all upper secondary schools there are obligatory core curricula defined for the basic level of teaching. In general upper secondary schools (*liceum ogólnokształcące*), however, starting at grade 1, there are 2 to 4 subjects chosen to be taught at the advanced level.

The core curriculum has to be respected by the school – but the teachers are free to follow one of the selected curricula with the use of a variety of textbooks

selected from the list approved by the Ministry.

During this stage in *liceum ogólnokształcące* the number of teaching hours per week over a period of 3 years is 98 (88 hours of subject teaching, 6 hours for religion/ethics and 4 hours left to the school head discretion).

The number of teaching hours in the 4-year *technikum* is 140 (129 hours of subject teaching, 8 hours for religion/ethics and 3 hours left to the school head's discretion).

The number of teaching hours in the 2-year basic vocational school is 70 (63 hours of subject teaching, 4 hours for religion/ethics and 3 hours left to the school head's discretion).

The number of teaching hours in the 3-year specialised 'lyceum' is 100 (91 hours of subject teaching, 6 hours for religion/ethics and 3 hours left to the school head's discretion).

The school governing body is allowed to increase the number of compulsory teaching hours by a number not exceeding 3 hours per week for one grade in one school year. The weekly number of compulsory teaching hours, additional teaching hours and religion/ethics classes cannot exceed a total maximum of 35 hours in all grades.

Subject teachers have the right to choose methods of teaching and are free to choose textbooks from the list approved by the Ministry.

3.2.6. Monitoring and Quality Control

Administrative and pedagogical supervision have become separated. Pedagogical supervision over the school is exercised by regional education authorities: *kurator* (superintendent), while general supervision (organisational, administrative and financial) is carried out by the school governing bodies (commune, district or voivodship self-governing authorities).

The measurement of educational achievements and the partial assessment of school performance are carried out now by the Central Examination Commission and eight Regional Examination Commissions. The external examinations at the end of the primary school and the gymnasium have been implemented since 2002. External support for schools and teachers is mainly provided by the National In-Service Teacher Training Centre, by regional centres and by educational advisors.

Pre-primary School

There are no formal principles for evaluating or monitoring pre-primary school children. The only exception is so called „balance-sheet of the child aged 6” which is connected with the recruitment to primary schools. This form of evaluation concerns only the state of health and physical development of a child. It aims at the selection of pupils that ought to be directed to special schools.

In public kindergartens, the teacher is responsible for continuous observation of the child and keeping up-to-date records of his/her achievements.

Primary School

In grades 1-3 pupils are promoted automatically if their achievements are assessed positively. Repetitions of the year are exceptional, and have to be justified by psychologists and accepted by the parents. In years 1-3 the assessment is descriptive.

Starting with grade 4, the teacher has the following scale of marks at his/her disposal: 6 - excellent, 5 - very good, 4 - good, 3 - satisfactory, 2 - acceptable, 1 - unsatisfactory. School marks, as well as assessment criteria, should be transparent to the pupil and his/her parents. Pupils are assessed separately in each subject. The evaluation depends entirely on the teacher. Only final marks per semester (half of the school year) and at the end of the school year have to be approved by the teachers' council in each school. The results of the assessment carried out during the year are taken into account in the end-of-year assessment. The assessment is divided into partial, semester and annual assessment. Pupils have the right to take an examination to verify the level of their ability if the semester or annual mark, given by the teacher, is in their or their parents' opinion too low. Pupils also receive marks for their behaviour (conduct) according to the following scale: excellent, very good, good, acceptable, unacceptable and reprehensible.

Starting with grade 4, a pupil is promoted to a higher grade if he has received „acceptable” (2) marks or above for all compulsory subjects at the end of the school year. If he/she receives an “unsatisfactory” mark in one subject, he/she can repeat the exam in this subject. A pupil who has failed the repeat is not promoted and remains in the same grade. The teachers' council of a school can decide about the conditional promotion of a pupil who has got an “unsatisfactory” mark in one subject only.

An external standardised test upon completion of the primary school (grade 6) was introduced in 2002. It provides pupils and parents as well as schools with information about the level of achievements of the primary school leaver. These tests are comparable on the national scale. The primary school leaving certificate is required for admission to lower secondary schools. The result of the competence test is mentioned in this certificate.

Gimnazjum

Internal evaluation at gimnazjum level is the same as that in primary education. A pupil is promoted to a higher grade if he/she has received “acceptable” (2) marks or above for all compulsory subjects at the end of the school year. If he/she receives an “unsatisfactory” mark in one subject, he/she can repeat the exam in this subject. A pupil who has failed the repeat is not promoted and remains in the same grade. The teachers' council of a school can decide about the conditional promotion of a pupil who has got an “unsatisfactory” mark in one subject only. At the end of each school year pupils will receive certificates in a standardised form.

At the end of the 3rd year of the gymnasium, an external standardised examination has been introduced. This examination checks abilities, skills and knowledge in the

field of humanities and science. It is compulsory for all pupils. The results are indicated on the gymnasium leaving certificate. They are comparable on a national scale.

The number of points indicated on the gymnasium leaving certificate decides about the pupils' admission to an upper secondary school. The detailed admission rules are defined by each upper secondary (post-gimnazjum) school which opens admissions to new pupils.

The Upper Secondary General Schools

The principles of internal evaluation are the same as those at primary schools. A pupil is promoted to a higher grade if he/she has received "acceptable" (2) marks or above for all compulsory subjects at the end of the school year. If he/she receives an "unsatisfactory" mark in one subject, he/she can repeat the exam. A pupil who has failed the repeat is not promoted and remains in the same grade. The teachers' council of a school can decide about conditional promotion of a pupil who has got an "unsatisfactory" mark in one subject only.

On completion of the 3-year general upper secondary school, pupils are awarded a school leaving certificate on the basis of school results, without a final examination. It mentions the subjects and the marks obtained at the end of the final year. It gives access to the *Matura* examination or to post-secondary education.

At the end of upper secondary education (except basic vocational schools) pupils may sit for *egzamin dojrzałości (Matura)*, a national examination, which is compulsory only for those intending to receive the *Matura* certificate and to gain access to higher education. The old type of *Matura* examination consisted of written and oral parts. Topics for the written part were set by regional educational authorities (*kuratoria*), but the assessment was done by teachers. The oral parts were totally the responsibility of teachers.

A new *Matura* examination, with its written part totally external – both in terms of setting the topics and the assessment – was conducted as an option for the first time in 2002. The new *Matura* examination was introduced into particular types of upper secondary schools in 2005, 2006 and 2007.

The Examination Commissions are totally responsible for the new *Matura* examination, as well as for all external evaluation in Poland.

The new *Matura* examination is held at the end of the 3-year general or specialised lyceum and at the end of the 4-year *technikum*. It consists of a written part, prepared and assessed by Regional Examination Commissions, and oral examinations, prepared and assessed by school teachers.

The Upper Secondary Vocational Schools and Vocational Certificates

The principles of internal evaluation in upper secondary vocational schools – i.e. partial, periodic and annual assessment – are the same as for primary education.

At the end of upper secondary technical education (*technikum*) pupils may sit for (*Matura*), an external national examination, which is compulsory only for those seeking to gain access to higher education.

Until 2004 at the end of the basic vocational school the vocational preparation of pupils was evaluated by means of a compulsory vocational examination. Its content and the level of requirements were defined by each school. Success in this examination, relating to the particular occupation, gave entitlement to the appropriate vocational school leaving certificates and the title of 'skilled worker'.

At the end of the upper secondary technical school (*technikum*) pupils were evaluated by means of a compulsory vocational proficiency examination. Its content and the level of requirements were defined by each school. Success in this examination gives entitlement to the *technikum* school leaving certificate and the title of 'technician'.

In 2004 the new external vocational examination (*egzamin zawodowy*) began to replace the old vocational examinations organised by schools. The introduction of this new exam is taking place according to the following schedule:

- In basic vocational schools in 2004 (in 2-year cycle) and in 2005 (in 3-year cycle)
- In upper secondary vocational schools in 2006
- In supplementary upper secondary vocational schools in 2007.

The new vocational examination is held in two forms: written and practical.

The exam is organised by the relevant Regional Examination Commission and aims at the assessment of students' knowledge and practical skills related to a given vocation.

3.2.7. School Autonomy and its Instruments

Decentralization of state education, carried out in the 1990's brought about growing parental interest in their ability to influence the form, range and control of schools. Bad conditions in many schools caused a lot of criticism but also fostered active reactions such as the creation of school councils, foundations or NGOs to collect funds for improving conditions at schools. Yet Polish society's involvement in helping schools achieve their educational targets is still quite low. Although organizations acting in the field of education are among the three most often chosen areas of social activity only 2.3% of adult Polish citizens belong to them.

From the legal perspective parents' influence on the way schools work is possible through representative bodies such as parents councils or schools councils.

The parents council can put forward petitions and opinions to the school council, teachers council and head teacher concerning all issues connected with the school. It also has the right to collect funds in order to support a school in fulfilling its statutory obligations. The rules setting out how the parents council should work are written down in the school statutes.

The school council is a body with much broader responsibilities and authority in the overseeing of educational institutions. It can be created by a motion from at least two of the three democratic bodies functioning at a school – the teachers council, student self-governing association or the parents council. It is constituted by an equal number of representatives from each of the organizations (in primary

schools this does not concern pupils) and the head teacher cannot be a member. School councils can deal with: putting forward petitions and opinions concerning the school's budget, presenting opinions on all plans concerning the way the school works and its future plans and collecting funds for the school.

In most Polish schools school councils do not exist. There is a legal right to create one at any time but this takes initiative and active participation on the part of parents, because one cannot count on the head's initiative to do it. In schools where a school council does not exist its duties are performed by a teachers council.

Another legally recognized organization is the public school council created by local governments at all three levels of local administration (commune, district and voivodship). It was assumed when the reform was being introduced that they would deal with studying and recognizing educational needs at the local level. As with school councils, there are few public school councils in Poland.

In order to foster the process of making schools more democratic and accountable to the public there are forms to be filled in by all the bodies functioning at a school. These are documents such as statutes, educational programmes, and development and prevention programmes. In reality the "mission statement" for a school is most often created by teachers' councils.

The level of parents' involvement in planning and supervising the functioning of schools is still rather low although during the last few years in different regions of Poland groups of parents have started working actively. They integrate their activities by creating regional and national organizations, e.g. the National Cooperative of Parents and Parents Councils located in Katowice (KPRiRR) or the Zachodniopomorskie Parents Society in Szczecin.

According to the KPRiRR one of the major obstacles to parents being able to get organised within the institutional framework of schools is the absence in the „Act on the System of Education” of procedures for democratic elections and organization on the part of their representative bodies. Another problem is the exercise of political pressure by local authorities who often treat public schools as reserved for them as an area for campaigning and gaining political support.

A few years ago the former Citizen Rights Spokesman (Ombudsman) was working on the proposal of establishing a National Education Council, an institution which could provide the outlines of wide-ranging, long-term strategic aims for our national education policy, and which could guarantee the realization of these aims regardless of an ever-changing political situation. At present this idea has been put into cold storage.

3.2.8. Educationalists, Particularly Teachers and Head Teachers

Pre-primary school teachers have the same rights, duties and salaries as teachers in primary education (years 1 to 3). The differences concern the teaching load which is 18 hours per week for primary school teachers, 25 hours for pre-school teachers of the younger age groups, and 22 hours for pre-school teachers of six-year-olds.

The system of pre-primary teacher training is constantly changing. At present, the forms of training offered are: three-year teacher training colleges, teacher

higher education schools (pedagogical academies), and teacher education faculties at universities. Out of the total number of teachers working in pre-primary schools, as few as 4.3% have completed only secondary education. Teachers with a Master's degree constitute 53.6% of pre-school teaching staff. The pre-school teachers are mostly female - women make up 99.3% of teachers at this level.

In grades 1-3 of primary school one teacher teaches all subjects (integrated teaching), while in grades 4-6 each subject is taught by a different teacher. To date, teachers have been trained to teach one subject. The newly introduced teacher training standards (Regulation of 7 September 2004) envisage training teachers as specialists in 2 subjects. Acquisition of computing skills and a good command of one foreign language is also becoming obligatory.

Teacher training consists of training in subject matter (biology, mathematics, etc.) and pedagogical training (teaching methods, psychology, pedagogy). Teachers may receive their initial training in three-year teacher training colleges awarding the title of *licencjat*. Graduates with *licencjat* may complement their education with two-year university study courses and obtain a Master's degree (*magister*).

In 2002/03 almost 90.2% of 232,193 primary school teachers had completed higher education (81.1% held a Master's degree), and 2.9% of teachers had only completed secondary education.

The legal act defining the professional status and conditions of service of teachers employed in the school education sector is the Act of the 26th of January 1982 – *The Teachers' Charter* (with further amendments - the most important ones of 18th of February 2000 and 24th of August 2001).

According to the *Teachers' Charter*, the post of teacher may be taken by a person who has completed either a higher education course with appropriate pedagogical preparation or a course of study in a teacher training college. Any person graduating from these institutions is recognised as a qualified teacher within the specialisation he/she has completed.

A teacher starting his/her first ever job undertakes a year-long preparation stage in order to obtain a qualification as a "contract teacher", and then embarks on another stage of 2 years and 9 months leading to a qualification as "appointed teacher". The appointment does not lose its validity if a break in service has not lasted longer than 5 years.

Teachers working in 6-year primary schools ought to have one of the following qualifications: university education or equivalent completed (the title of *magister*), 3-year teacher training college completed (the title of *licencjat*), 3-year teacher training college completed (ending with a diploma, without the title of *licencjat*), a diploma of the formerly existing 2-year teacher training colleges (phased out at the beginning of the 1990s).

According to the *Teachers Charter*, a teacher can obtain the following professional grades: trainee teacher, contract teacher, appointed teacher and chartered teacher. An opportunity to receive the honorary title of education professor is also envisaged for chartered teachers with outstanding professional achievements.

The *Teachers' Charter* amendments (of 18 February 2000 and 24 August 2001)

established new rules for the remuneration of teachers as well as a new mechanism for the State to guarantee the availability of funds for their salaries. The average salaries for teachers classified in individual categories are calculated on the basis of the average salary of the trainee teacher, fixed at a level of 82% of the average state sector salary. This is a fixed mechanism for an annual revaluation and raise in teachers' salaries, identical to that for other parts of the public sector.

The average salaries for teachers classified in the remaining categories are calculated as the following percentages of the average salary of the trainee teacher (target percentages have been achieved gradually): contract teacher 125%, appointed teacher 175%, chartered teacher 225%.

The new remuneration system introduced a different division of powers concerning pay regulations. The powers of the Minister of National Education are limited to fixing the minimum rates of basic pay, whereas the rates for bonuses or allowances (except for the allowances for work in rural areas, which are fixed by law) and the rules for granting these are determined by the body responsible for the management of a given school.

According to the Teachers' Charter, the working time of the teacher may not exceed 40 hours per week. This workload includes the minimum teaching load which for the basic group of teachers (in all types of schools) is 18 hours per week (45-minute lessons). At the teacher's request, his/her weekly workload may now comprise up to 27 hours per week, with any increase in the workload implying a proportionally higher salary.

The teacher is required to improve his/her knowledge by participating in all forms of in-service training.

Teachers employed in the 3-year gymnasias ought to have – at a minimum – the qualifications reflected in the title of *licencjat*. 3-year gymnasium teachers are employed according to the same rules as apply to 6-year primary school teachers. In 2002/03 almost 97.1% of lower secondary school teachers had completed higher education (88.9% held a Master's degree), and 1.5% of teachers had only completed secondary education.

Upper secondary school teachers ought to have completed a university education (*magister* degree) or equivalent. 98.7% of teachers of general upper secondary students have completed higher education. In vocational schools, this percentage is lower: 95.7% in technical and vocational secondary schools and 78% in basic vocational schools.

The teachers at post-secondary vocational schools come from the labour market as well as from secondary and higher education.

3.2.9. Support Structures

At the regional level, self-governing 'voivodships' are responsible for running certain types of educational institution. These institutions are: teacher training colleges, teacher in-service training centres, pedagogical libraries, schools and institutions of importance for a given region.

The participation of social partners (individuals, institutions and organisations)

in school work does not occur on a large scale. A national education council which includes parents' representatives is enshrined in the legislation (the Education System Act of 7 September 1991, with further amendments). This council has not yet been established, but it should act in a consultative capacity on education policy, the budget, the curriculum and legislation.

The National Convention of Parents and Parents Councils is an organisation representing pupils' parents at national level.

There are about 500 centres for guidance and counselling in Poland. They are intended mostly for primary and lower secondary school pupils, with the aim of providing psychological assistance. The other field of activity of these centres is focused on counselling and guidance when a child chooses upper secondary school (it is intended for those who are either hesitant or have poor results at the gymnasium).

Some large schools employ school pedagogical counsellor or psychologist who contribute to the solving of individual or internal school problems. Institutions of special assistance to pupils (i.e. psychological and vocational counselling centres) perform important diagnostic and therapeutic functions. They are a requisite of success when starting primary education, and diagnosing predispositions relating to post-primary school selection.

Research on educational problems is carried out by the Institute for Educational Research and a number of departments of education within Universities.

In the last 17 years we have witnessed the emergence of a large number of NGOs involved in the problems of education e.g. The Centre for Civic Education or the foundation "Education for Democracy". They play a very important and stimulating role for the whole system of education.

3.2.10. Social Dimension

As was mentioned in part III, according to the plan for school reform two areas have become target areas for reform of the system of education:

- Creating equal educational opportunities for all children and teenagers: the obstacles which do not let some students get well educated (parents' economic status and their level of education, place of living, disability) are to be overcome.
- Improving the quality of education, preparing the graduates both for adult life and for permanent self-development. The new curricula were created so as to provide each graduate with the basic skills necessary for adult life: skills necessary for further learning, interpersonal communication, teamwork, a creative attitude towards problem-solving, a good command of computer programmes and foreign languages.

The choice of school for a child. Instead of obligatory enrolment of a child in the nearest school, the reform of the educational system gave parents freedom to choose a school for their children. The opportunity to make a free choice of school for one's children was treated as a democratic gain. What follows from this fact is fear of a growing social selection of pupils. Data collected in polls and

research conducted so far does not show that parents' freedom of choice can add considerably to the already existing social inequality, although there have been signs of schools' differentiating as some schools try to achieve more than average levels of achievement and become 'elite'. Sometimes 'gymnasia' are willing to enrol outstanding students outside their own area and later put them into separate classes offering better educational conditions.

'School of excellence' program. Few years ago a very valuable public initiative called "School of excellence" came into being in Poland. It is an action promoting public support for Polish education organized by the Centre of Civic Education Foundation (NGO) together with the influential daily *Gazeta Wyborcza*. Schools participating in this action (more than 4500) carry out very ambitious educational tasks, getting thousands of parents and other citizens from their area involved. Every 'school of excellence' creates its own programme to meet specific local needs. They all try to function in accordance with the following rules: the school educates well every individual student, assesses him/her fairly, teaches students to think and to understand the world, teaches students to become active members of society and prepares them for the future. "Schools of excellence" have their own network in the internet. The action is very popular and it fosters in an unobtrusive way high standards and the features of a good school.

4. Key Problems and Perspectives, Publicly Discussed Problems, Dilemmas, Main Topics, Priorities of Educational Policy and Educational Research, Perspectives

Remarks Summing up the Period of Transformation

In my opinion the changes introduced during the period of "reconstruction and modernization" were more important than the reform introduced in 1999. Poland has no long-term educational policy, i.e. a policy which would foresee the state of the education of Poles in 15-25 years' time and point out how this state is to be achieved. There were some attempts to create such a strategy, but for the most part they were based on short-term plans (spanning 2 or 3 years), they were usually not negotiated with the opposition, and were quickly discarded and forgotten.

During the last 17 years:

- little has been done for the internationalisation of education – the international baccalaureate should have been promoted;
- the European Computer Driving Licence has not been introduced into upper secondary education; the aim, which should have been introduced into the education system, should have been to make sure that each secondary school student, together with those who have the "matura" diploma, graduate with an ECDL, a document which has existed since 1996 and which opens doors to work opportunities in a united Europe. In Poland, many private schools make the ECDL available to their students.

- dynamic works, which began in 1990 and were aimed at large-scale improvements in the foreign language teaching (the creation of Foreign Language Teacher Training Colleges) later lost their impetus, but in 2008 the teaching of first FL will start in the first grade of primary school and the teaching of second FL will start in the 4th grade. Polish graduates do not receive internationally recognised certificates confirming their knowledge of foreign languages.
- educational reform creating the 3-year lower secondary schools, motivated by the need to create equal educational opportunities, did not improve the learning conditions of children from families with a bad SES, as these opportunities largely depend on the medical, psychological and pedagogical attention paid to the child during kindergarten and early school education.
- in the 1990s there were no attempts to reverse the process of shutting down kindergartens, especially in rural areas. The importance of kindergarten education has only become appreciated in the years following 2000.
- in giving local governments the right to supervise education in their area little was done to make these authorities aware of how important educational policy is for a community aiming at becoming a 'knowledge society';
- lower demographic pressure (leading to falling school rolls) was not taken advantage of in order to improve learning conditions, and the school buildings – now used to a lesser extent – were not utilized for teaching adult learners.
- neither the Ministry nor public educational institutions showed interest in the prospect of organizing distance education at the secondary and tertiary level, especially for those persons, who were in the past unable to get an appropriate education.

On 23 June 2007, in the opinion-forming Warsaw weekly magazine "Polityka", there appeared an article entitled "Giertych daje szkołę" ("Giertych gives us a lesson"), which started with the sentence: "It is the end of the school year, in which the Minister of Education, Roman Giertych, fought to get a good mark for active participation. However, the impression the Minister managed to make was of an ADHD child continually disrupting the class." The authors of the article believe that from the beginning of his term of office in February 2006 until the present the Minister initiated a new campaign (program, project, initiative) approximately every two weeks. Each of these was aimed at bringing about important changes in the educational system, yet each one was only begun and then overshadowed by its successor.

These initiatives were not intended as a starting point for a debate on education, they were presented rather as the Ministry's *panacea* for all that is wrong with the system. Regardless of the Minister's intentions, his initiatives provoked a more or less vigorous public reaction, i.e. something along the lines of a very disorganised public debate.

Below is a list of the issues which caused the biggest reaction in the last year:

1. The initiative against violence and aggression in schools. Based on a few – very much publicized by the media – events, one of which had a truly tragic outcome (a female lower secondary school student who was harassed by fellow-pupils committed suicide) educational authorities came to the conclusion that school aggression was omnipresent and special means were needed to restore order. Accordingly, in November 2006 the „Zero tolerance for violence in schools” program emerged. Within this program the following actions were undertaken:

- Introduction of monitoring systems in schools;
- prohibiting minors from congregating in public places during the night;
- appointing the so-called “Giertych’s threes” (consisting of a police officer, a local government representative and a board of education representative), whose task were to diagnose the scope of aggression and violence in schools;
- a plan to create special ‘strict discipline schools’ (‘boot camps’) for those students who pose the most problems;
- prohibiting the use of mobile phones in schools.

It was also made impossible for students to be able to access through school computers websites propagating violence or sex (the use of special filters).

Those initiatives generally met with a positive response from the so-called „average citizen”, as they promised simple and radical solutions for existing problems. The „Zero tolerance” program also comprised many constructive recommendations, e.g. how to draw students’ attention away from inappropriate ways of spending time by the organization of after-school activities. However, restrictive proposals were of the most interest, as they seemed to be in line with the general conviction that more discipline was needed in bringing up children.

2. The so-called “matura amnesty”, announced in September 2006, caused much controversy. It consisted in the Minister’s directive changing the criteria for the grading of this examination, so that many students, who had originally failed now learned that they had indeed passed the exam. The Minister was accused of lowering the standard of the “matura” examination. Many tertiary education institutions, which had earlier agreed to treat the diploma as a ticket to tertiary education, also protested. In January 2007 the “matura amnesty” was deemed unconstitutional.

3. In January 2007 the Minister ordered schools to list all pregnant students. Officially, this was done so that these students could be adequately cared for. Public opinion, however, saw this as stigmatisation or a foreshadowing of restrictions. Many statements made by the Minister and the Deputy Minister show their negative attitude towards sex education and informing students about available means of contraception, not to mention abortion. In Polish schools, in accordance with recommendations of the Roman Catholic Church, it is only possible to express a positive opinion on so-called natural methods of birth control.

4. In 2006 the head of the National In-service Teacher Training Centre was fired because he published a translation of the manual on tolerance prepared by Council of Europe. The scenarios of lessons presented in the manual were described as “propagating homosexuality”. According to the Minister, any information given to students about the existence of homosexuality amounts to propagating it. In the

education system the only permitted view is that homosexuality is a deviation. In March 2007 'propagating' homosexuality in schools was prohibited.

5. "Patriotic education" has been initiated, which is meant to consist in organizing field trips to sites of the Polish nation's 'martyrdom'. There is a suspicion that the idea of introducing the subject of "patriotic education" into schools in the form of „a turn towards the past and the cult of martyrdom" is the Minister's attempt to counterbalance civic education as introduced at the beginning of the 1990s, which aims at forming conscious and active citizens of a contemporary society. It has also been announced that Polish history is to be taught separately from general history.

6. The role of religious education has been increased – from 2010 religion is to be one of the "matura" examination subjects (this initiative was introduced in May 2006). In the meantime educational authorities want the grade obtained by students in religious education classes to be treated like all other grades and to have an impact on the grade points average – the GPA is important in applying for colleges and universities.

7. According to the Minister and the Deputy Minister Darwinism is only a hypothesis and, what is more, it has proven less convincing than Creationism. They believe this view should be incorporated into the curriculum.

8. In June 2007 the Minister announced that there will be changes in the school reading list – the removing of important Polish and world writers, such as Goethe, Dostoevsky and Gombrowicz, and their replacement by Polish authors such as Dobraczyński, writing in the "God-and-Country" spirit. This idea caused a violently negative reaction. The Minister tried to tone down the conflict by saying this was just an idea to be discussed.

9. Starting from September 2007 all schools have been required to introduce school uniforms.

10. In ministerial circles there appear statements in favour of abandoning co-education and the introduction of all boys and all girls schools. It is not clear what is meant to be achieved by this – single sex schools have had a longstanding tradition in Poland. At present there exist a small number of private single sex schools. It is thus possible that nothing will come of these statements.

It is not hard to guess that the above-mentioned list of the Minister's initiatives and views causes intellectuals and liberal-minded people to express concern for the state of education in Poland.

In conclusion, I would like to stress that my personal attitude to the activities of the Minister of Education is critical. I believe he is looking to the past instead of the future. No deliberations are undertaken concerning the effects of PISA research, "key competencies", scenarios for the future of education, European ideas or possible ways of taking up the challenges of the 21st century.

In August 2007 Giertych (being the head of the League of Polish Families) lost his ministerial post because of the collapse of ruling coalition, but the present (October 2007) minister from The Law and Justice party is probably ready to continue the

Giertych's way.

In Poland the educational lobby hardly exists – there is a lack of a group of people (not necessarily educational professionals) or organisations trying to convince public opinion that certain educational solutions should be adopted. There exists a teacher lobby which looks after its own interests, but this is something else.

At present, each change in the political context (the coming to power of one or another party) may – but does not have to – mean changes in the approach to education, especially since within this sphere it is easy to be a rabble-rouser, make empty promises, etc. If I am to be optimistic I would expect in the future, a social contract between the main political players to emerge, which would define some rules of educational development. Up to now education was defenceless, but recent victory of Citizens Platform during the election that took place in October 21st can create new and much better situation.

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EDUCATIONAL TRANSFORMATION IN SLOVAKIA: THE ONGOING SEARCH FOR A SOLUTION

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Abstract: *The study presents the Slovak Educational System in its historical perspective, especially in a period of time after political changes in 1989 characterised as a started but not finished yet process of transformation. The authors describe the current shape of this system in some specific areas - management and administration of the educational system, financing of the school system, structure of the Slovak educational system, curricular policy and development, monitoring and quality control, school autonomy and its instruments, the role of the teachers, support structures and social dimension. They characterise the key problems and perspectives of the process of transformation, where some necessary steps were already done, but the outcomes for a complex educational reform are still not prepared as a main priority of the governmental policy, although the Slovak education system shows the attributes of stagnation, what would have a bad impact on a future of economic growth and a development of social life in the country.*

Key words: *educational system, educational reform, educational transformation, macro and micro level of educational development, systemic reform of education, strategic documents and acts*

1. Basic Information on the Country

Slovakia – the official name is the Slovak Republic – is the smallest country in the group of V4 in terms of area and population. Its area is 49,035 km² with 5,422,000 (2004) inhabitants. The capital city Bratislava is situated in the south-west of the country, on the left bank of the river Danube, very close to Austria. Slovakia is a parliamentary republic, where legislative power is in hands of the national parliament with its 150 members. Executive power is in the hands of the government, while the head of the country is a directly-elected president.

The Slovak Republic was established on 1st January 1993 after the partition of the Czech and Slovak Federative Republic (Czechoslovakia). Slovakia had been a part of Czechoslovakia since 1918. Previously, in fact since the 11th century, it was a part of Hungary or the Austro-Hungarian Empire. The Slovaks were an ethnic minority on the margins of political, economical and cultural power. From this position Slovaks gradually formed themselves to a modern nation, whose political, social and economical ambitions were realised only when Czechoslovakia was formed. The establishment of a standardised Slovak language by a group of Slovak intellectuals in 1843 created a possibility of cultural development, but was restricted by the national policy of the Hungarian state in the second half of the 19th century. The

Slovak language was only used in a limited way within the Hungarian educational system at the primary level of education. There was no possibility of education in Slovak at secondary or higher levels of education. The Slovak primary, secondary and higher educational system started to work only after Czechoslovakia had been established. The first Slovak university – Comenius University in Bratislava - was established in 1919.

During the Second World War there was a puppet Slovak republic as a result of Hitler's central European politics. It was completely dominated by Germany. After the restoration of Czechoslovakia in 1945, and the political takeover in 1948 by the communists, Slovakia became for more than 40 years part of the Soviet Union's sphere of interest. An attempt at democratic changes in the late 1960s was forcibly interrupted in 1968 by Russia and its allies. Satisfying the ambitions of the pro-soviet Slovak politicians, in 1969 Czechoslovakia was declared a state made up of two federal republics. The principles of federation were not fulfilled because of the centralised political power of the Communist Party. This was seen also in the educational system, which was formally autonomous in both federal republics, but actually was influenced by the ideology of the Communist Party.

The end of communism in Czechoslovakia in 1989 meant the start of fundamental political, economic, social and cultural changes leading towards a democratic political system and market economy. The political and ideological privileges of the Communist Party codified in the constitution were repealed. This had a far-reaching implication for education, too. Among a group of political leaders in Slovakia an idea about a future Slovakia as an independent country became popular. Their strengthened political pressure led to the peaceful and properly managed partition of Czechoslovakia within a legal framework.

The establishment of the Slovak republic in 1993 was a new precedent in the history of the Slovaks. They set up their national state without any dependence on foreign political influence. This affected the process of construction of the political, economic, social and cultural system of the country. While, for example, in the Czech republic, Hungary or Poland from the beginning of the political changes in the 1990s a pluralist system of political parties was based on right – left polarity, in Slovakia that polarity was determined more by the questions of the place of authority or democracy in public life, of nationalism, isolation, orientation towards the East or towards the European Union etc. The right – left polarity of the Slovak political parties has become more evident only in the last few years.

The Slovak republic at the time its establishment appeared to be the least developed country in the region. The other unique characteristic of Slovakia, as the youngest country in the region, is its ethnic structure. Slovakia is a multi-ethnic country. There are 85.8% Slovaks, 9.7% Hungarians, 1.7% Roma (actually around 9%), 0.8% Czechs, 2% Ruthenian, Ukrainians, Germans, Polish and others. This structure is not a result of migration in the 20th century. It has historical roots (except for the Czechs in Slovakia which is the result of a natural migration of inhabitants in the former Czechoslovakia).

After the years of turbulence, economic instability and relative international

isolation, most problems in a field of international relations, economic development and social stabilisation were successfully overcome, so that nowadays Slovakia is, at least, comparable with the other post-communist countries of the region. In 2000 it became a member of OECD. Since 2004 (March) it has been a member of NATO and in May 2004 it became, together with its neighbours, the Czech republic, Poland and Hungary, a member of the EU.

At present (2007) Slovakia shows the second fastest level of economic growth among the EU countries. Thanks to successful reforming steps in the field of tax and enterprise policy, the volume of foreign investment has risen considerably. This has had a positive effect on the rate of unemployment. Economic growth affects all areas of social life. The need for a qualified, movable and flexible labour force put pressure on the educational system, which has been not reformed, unlike other social and economic sectors. It shows the attributes of a stagnating system, which will have a bad effect on the future of economic growth and the development of social life in this country.

2. Transformation of the Educational System (1989 – 2006)

The results of political changes in 1989 in the former Czechoslovakia were similar to those in the other post-communist countries of the region. Above all, the formal „deconstruction“ of the political and economic system determined by „the leading role of the Communist Party in society“ had to be undertaken. The process of „deconstruction“ was naturally transferred to the educational system. Although its formal structure was not disrupted, already in 1990 some fundamental content changes were made in the curricula of those school subjects which had been based on the ideology of the Communist Party. In primary and secondary schools this concerned History and Civic Education. In universities the changes applied to the so-called Marxist – Leninist departments. They existed at all universities under the direct control of the Communist Party. All students had to attend such subjects as Political Economy, Marxist-Leninist Philosophy and also (for the students of pedagogic faculties) Scientific Atheism.

From 1990 a spontaneous process of democratisation appeared in the system of school management in the form of progress towards self-government. Teachers, employees and students started to vote for their heads, deans and rectors. They spontaneously created the self-governing authorities of schools and faculties. This created the conditions for systematic legislative changes in the form of an attempt to elaborate a document outlining the future development of the system of Slovak education. It was published by the Ministry of Education in 1990 under the heading „Spirit of School“. Some ideas from that document were turned into partial legislative changes, but it did not attract the interest of political leaders making strategic decisions.

The political and economical changes after 1989 also had some negative effects, which appeared in a field of education. The new educational policy was implemented under rather unfavourable socio-economic conditions. These

conditions were influenced primarily by a decline in the performance of the economy and a high unemployment rate, including among graduates, which led to a decline in demand for skilled workers and to a lowering in the social provision of the education system (reduction in kindergartens, school clubs, extra-curricular educational establishments).

This situation resulted in undesirable changes in terms of values and in a stronger social differentiation between different sectors of the population with all the negative political and social consequences that result from this in terms of the instability of political structures and government. There was not enough interest among the leading political elites of the country to focus their attention on fundamental questions of education and how the system of education might develop through high quality educational legislation acting as a decisive instrument of successful management (The Educational System in Slovakia, 1995).

The first few years after the establishment of an independent Slovak republic were marked by two different forms of educational development. On the macro level, determined mainly by decisions of government, this was a time of stagnation. There were no legislative, organizational or curricular decisions which could fundamentally influence the quality of the educational system.

The micro level of educational development, on the other hand, proceeded in a non-governmental area and was aimed mainly at the positive shaping of teachers' educational strategies in primary and secondary schools. Enthusiastic teachers and other educators started to associate around non-governmental organisations developing international educational projects trying to reform the educational system and curricula. At that time they created some projects which have probably been of most influence in changing the educational practice of the teachers at primary and secondary schools, something which is noticeable also at the present day (for example Project Orava – implementation of the principles of democracy in schools, the project of Integrated Thematic Instruction, the Program Step by Step...).

The spontaneous reforming movement at micro level was so strong and had such great influence on public opinion that it was not possible to allow it to affect the outline of education policy at the macro level. In 1994 the Ministry of Education initiated a public discussion and after that a strategic document – "Konštatnín [Constantine]". That document tried to design a vision of educational development for the next 10 years with the aim of reaching some qualitative and quantitative changes that would take Slovak education close to European standards. For example:

- raising the number of secondary school graduates among the population of 18-year-olds from 40% to 80%,
- raising the number of accepted students at higher educational institutions among the population of 18-year-olds from 11% to 30%,
- raising the number of students among the population between 25 and 65 from 7% to 10.7% (Zelina 2005).

That project was very ambitious, but in many areas it did not begin from the real

potential of the economy and the dynamics of political and social development in Slovakia at that time. In spite of that, it could have offered a good programme for the forthcoming period of reconstruction and modernization of the Slovak educational system. This did not happen. Mainly for political reasons it was not accepted by the new government after an election in the same year.

The most successful project has been one called "Millennium". Thanks to the initiative undertaken by a group of educational experts it has looked for a possible social and political consensus on the elaboration of a national education programme. In 2001 this was approved by the government as "The National Programme of Education" and after that, in 2002, the national parliament approved it too.

The programme is elaborated over 12 areas, which are the basis for educational development over the next 10 – 15 years. These 12 areas could be seen as "the conceptual pillars" (Zelina 2005) of the national programme:

1. revitalisation of educational research and participation in international research and developmental projects,
2. humanisation of educational practice (basing it on principles of pupil/student-centred education),
3. curricular transformation – elaborating a curriculum at two levels (national and individual school curriculum) and reducing the nationally-determined educational content to 60% (40% of the educational content would be implemented by school curricula according to the local context and individual needs of pupils and students),
4. innovation of educational strategies leading towards experiential forms of learning,
5. decentralisation of school management and administration,
6. emphasis on teachers' professional development, elaborating a system of motivation for their lifelong learning and a system of career development for them,
7. funding schools – till 2006 rising by 3.2% of GDP,
8. creating a system of supporting institutions for schools,
9. intensive implementation of ICT in schools,
10. increasing the quality of foreigner language instruction and aim for students ending secondary education speaking at least two foreign languages,
11. making secondary schools more flexible towards practical needs and increasing the motivation for lifelong learning,
12. creating a systemic and legislative framework for transformation of the educational system.

Carrying out the programme was problematic from the beginning. There were many reasons for this. One of them was the fact, that the political consensus about the document among political parties in the national parliament was not real. The implementation of the "conceptual pillars" depended on the political will of a government, or on the personal opinion of a particular minister of education.

The next serious problem was based on the fact that the programme and its proposals were approved without real knowledge of the actual state of the Slovak

school system and education under changed political, economic and international conditions. Slovakia was the only one among the group of Visegrád countries which did not use the opportunity to gain financial help from EU funds during the accession process for analysing and evaluating its educational system and this was not even done using national resources. Political elites and education experts upheld for a long time a view about the high quality of the Slovak educational system and educational practice. They influenced public opinion and inhibited public pressure for the necessary changes.

Because of a lack of real political consensus, the conditions for realising the “conceptual pillars” were not present. There were still not enough stimuli and institutions for carrying out the research needed for planning the strategic steps of educational reform. This seemed (and still seems) to be a fundamental condition for high-quality systemic educational reform in Slovakia. The need of such reform has been partly satisfied by particular education law amendments, though most of those amendments were done “ad hoc” without any systematic perspective. The administration concentrated its effort at first on institutional changes while the only changes that took place were the spontaneous (not systematic) educational innovations on the micro-level of the educational system.

The Act on the System of Primary and Secondary Schools from 1984, based on the educational policy of the Czechoslovak Socialist Republic represented by the project “The Further Development of the Czechoslovak System of Education” (1976), is still valid in Slovakia. This act is a very good example of steps taken in deconstructing the ideological basis of education under communism and also an example of how the process of modernisation of the school system was primarily done in accordance with actual political and administrative needs. Miron Zelina (2005), one of the key authors of the project “Millennium”, points out that during 1990 – 2005 the Act on the System of Primary and Secondary Schools was amended 12 times. If we choose some of those amendments in chronological order, we can see what the education policy generated and what were the main areas in which the administration focused its attention during the process of deconstruction and reconstruction of the educational system between 1990 – 2005.

The first amendments were made early in 1990 to avoid the ideological monopoly of the Communist Party in education. They also founded the pluralistic character of the educational system, with the possibility of establishing private and church schools as an alternative to state schools. The length of compulsory school attendance was set on 9 years.

After the formation of the Slovak republic there was an amendment in 1994. The right of national minorities in Slovakia to be educated in their own languages was defined by law (it had been realised in practice a long time before). The amendment in 1998 extended compulsory school attendance from 9 to 10 years. In 2000 there was an amendment to solve the problem of education of pupils and students with special educational needs educated at a “separate special school [*osobitná škola*]”. This was renamed a “special basic school [*špeciálna základná škola*]” and the pupils and students at those schools, previously called “disabled”, were renamed “pupils/

students with special educational needs". All the educational functions, educational approaches and methods at such schools remained the same.

So far the only amendment, which has had a more important systemic effect was the one passed in 2001. It was a reaction to a new act reorganising the state administration and self-government. The municipalities and the higher self-governing authorities became the new founders of schools and school facilities which had previously been state foundations. It also affected of the system of financing those schools and school facilities. The next amendment to the act in the same year set up a multi-source school financing system. The financial resources coming from the state budget to the schools started to be distributed in a "normative" way (depending on the number of students and other clear indicators). This helped to make financial flows from the taxes of citizens to the school system clear, systemic and under public control. The centralised administrative role of the state in the school system became more devolved towards local authorities.

The amendments of 2002 redefined the basic school (ISCED 1 – 2) as an institution with 9 grades and the possibility of establishing a "zero grade/ zero class". Zero grade/zero class was set up for six year old children who did not achieve the necessary level of ability and came from socially disadvantaged settings. They did not have to deal successfully with the curriculum of the first grade in one school year (they could do it in two school years – the zero and the first one). Thanks to that, it has been possible to employ teacher assistants at kindergartens and basic schools. They can help to these children to overcome mainly language, health and social barriers, which make the process of their adaptation to school settings more difficult.

The Act on the System of Primary and Secondary Schools and its amendments was an example of state administrators understanding the meaning of the notion "educational reform" in past years. The situation is similar in the case of other acts which fundamentally influence the Slovak educational system:

- the Act on State Administration and Self-Government in Education (1990, amended in 1996, 1999, 2001, 2003),
- the Higher Education Act (1990, amended in 1996, new act in 2002),
- the Act on School Facilities (1993, amended in 2001),
- the Act on Further Education (1997, amendment of 2001),
- The Act on Funding the School System (2001, 2003).

3. Management and Administration of the Educational System

The management and administration of the educational system are governed by those education acts. The central body of the state administration for all schools and school facilities is the Ministry of Education. This represents a central authority creating a unified state education policy. The ministry and some of its directly managed central organisations such as the State Pedagogical Institute and State Vocational Education Institute prepare draft laws and general binding legal regulations in the field of education. Its main task is to draw up the general

study plans and curricula for all type of schools and school facilities at pre-primary, primary and secondary level of education (ISCED 0 - 4). It is also responsible for examining the issues concerning education and its further development.

General administration at regional level is represented by eight regional school offices which have been working since 2002. In that year the state administration was transferred to municipalities and self-administrative regions. The competences of the school offices are identical with the seats and territorial area of competence of the self-governing regions.

The work of the state administration in the field of kindergartens, primary schools and school facilities has been transferred to municipalities, including that of establishing and closing schools and facilities, appointing school principals, creating the right economic, material, technical and personnel conditions for the operation of schools and school facilities, and managing the appropriate spending of allocated funds. Self-administrative regions have been authorised to establish and close secondary schools, special schools and school facilities and to be in charge of the state administration at the second level (Educational System in Slovakia 2005).

According to the Act on State Administration and Self-Government in Education (2003) the structure of the state administration of the school system is hierarchically organised from the top, as represented by the Ministry of Education and other central state administration bodies, the State School Inspectorate which is accountable to Regional Educational Authorities, municipalities (within the scope of the authorities which have been transferred from closed district offices) and principals of schools and school facilities.

4. Financing the School System

In spite of some particular steps in the process of educational reform and different statements of intent by new Slovak governments, education does not belong among their real priorities. What makes this evident is the level of expenditure on education from the state budget.

Expenditure on educational institutions as a percentage of GDP for all levels of education shows one of the main reasons leading to a low quality of education in Slovakia according to international comparisons (for example PISA 2003).

Since 2004 the funding of schools has been regulated by the Act on Funding Basic Schools, Secondary Schools and School Facilities. According to the Act the state budget covers free education at primary and secondary schools, the financing of educational and provision of fees for financing development, reconstruction, modernisation and material-technical equipment at schools. The financing of state schools from the state budget is based on a formula designating contributions for each calendar year according to number of pupils or students from the school. The norm includes a wage norm (for wages and salaries, insurance and employer's contributions) and an operational norm (funds annually prescribed for running costs of the school and costs for the teaching process estimated per pupil or student).

Table 1. Expenditure on educational institutions as a percentage of GDP for all levels of education (1995, 2000, 2003) from public and private sources, by source of funding and year.

2003			2000			1995		
Public	Private	Total	Public	Private	Total	Public	Private	Total
4,3	0,5	4,7	3,9	0,1	4,1	4,6	0,1	4,7

Table 2. Annual expenditure on educational institutions per student for all services (2003) in equivalent US dollars, by level of education, based on full-time equivalents.

Pre-primary education (for children 3 years and older)		Secondary education			Tertiary education (including R&D activities)	All tertiary education excluding R&D activities	Primary to tertiary education
	Primary education	Lower secondary education	Upper secondary education	All secondary education	Tertiary-type A & advanced research programmes		
2 641	2 020	2 106	2 737	2 401	4 678	4 299	2 602

Non-state schools receive grants according to a similar formula to that for state schools, but the funds for reconstruction and modernisation of school equipment are not provided from the state budget.

For financing regular non-compulsory special-interest education, the pupils and students are granted educational vouchers (Educational System... 2005).

Table 3. Total public expenditure on education (1995, 2003). Direct public expenditure on educational institutions plus public subsidies to households (which include subsidies for living costs) and other private entities, as a percentage of GDP and as a percentage of total public expenditure, by level of education and year.

Public expenditure on education as a percentage of total public expenditure				Public expenditure on education as a percentage of GDP			
2003			1995	2003			1995
Primary, secondary and post-secondary non-tertiary education	Tertiary education	All levels of education combined	All levels of education combined	Primary, secondary and post-secondary non-tertiary education	Tertiary education	All levels of education combined	All levels of education combined
7.3	2.2	11.2	8.8	2.9	0.9	4.4	5.0

Source: Education at a Glance, 2006

5. Structure of the Educational System

The Slovak educational system reflects the historical development of Slovakia as a geographical, social and cultural area. Its current form is mostly determined by the Austro-Hungarian tradition of centralised and selective schooling, the Czechoslovak tradition of a unified school system and the educational ideals of J. A. Comenius (especially his idea of instruction based on illustrated textbooks understood as a model description of the world which a pupil or student has to learn – mostly by heart) and by uniform curriculum and education strategies transmitting knowledge on a centralised basis – an approach that is a heritage of communism. Although the Slovak school system has been changed in many ways since 1989, these three historical determinants are still present at all levels of the system.

The organisation of the institutional education is based on a system of “education and training”¹ which is defined by law. This system is horizontally and vertically segmented and consists of two types of institutions – schools and school facilities. The school facilities form a supporting system for education at schools. The founders of schools and school facilities at all levels of the system are the state, self-governing authorities, churches and individuals.

¹ The terminology is influenced by German and Russian educational terminology. Education is understood as the formation of a pupil's or student's personality. Training is a process of providing knowledge and the ability to use it in practice. Recently the notion of education has been defined as an integration of education and training. We use it in this way.

1. *Kindergarten* (ISCED 0) is a pre-school education facility for 3 (possible 2) – 6 year-old children. Its aim is to complement family education a child's whole personal development and to prepare the child for compulsory education. Education at kindergarten is optional. Special kindergartens or classes for children with special needs have also been established.

2. *Basic school* (ISCED 1, 2) represents the first period of compulsory school attendance lasting 9 years (from 6 to 15 years old). It is divided into two stages. The first stage – primary school (ISCED 1) lasts 4 years (grades 1 – 4). The second stage – lower secondary school (ISCED 2) lasts 5 years (grades 5 – 9). The basic school provides general education. Its curriculum is compulsory for all pupils or students at basic schools and it is centrally defined as a general framework curriculum which could be carried out according to three alternative study plans.

Children are admitted to a basic school upon attaining the age of 6 years. Children with special needs attend a special basic school with the same structure as a basic school, but with a different curriculum and educational strategy. Special basic schools usually accept children on the recommendation of educational and psychological advisory centres established in each region.

Most primary schools also include some school facilities - school club, school library or other facilities for education outside classes. After finishing basic school, students are required to apply for a secondary school and at least to complete their compulsory school attendance (1 year).

In the early 1990s a new step was taken by establishing the so called Eight-Year Gymnasium (general secondary school) which joined the second stage of basic school with secondary school (ISCED 2 + ISCED 3A). Pupils finishing the first stage of basic school with very good educational results can apply to this school through the entrance exam (generally Mathematics and the Slovak language or the instructional language of the relevant school – Hungarian, Ukrainian...).

3. *Secondary school* (ISCED 3, 4) provides upper secondary education and guarantees the last year of compulsory school attendance. Getting a secondary school education is possible in one of three streams of upper secondary schools. The first one is represented by the Gymnasium, the second one leads through the Technical Secondary School and the third one is the Vocational Secondary School.

Gymnasium (ISCED 3A) is a general grammar school and prepares students for study at higher educational institutions or for a post-secondary study. A Gymnasium is normally 4 years, though a bilingual one is 5 years and there is also a possibility of attending gymnasias for 8 years.

Technical Secondary School (ISCED 3A) provides technical education with a school-leaving certificate [*maturita*] and higher vocational education. It prepares students for occupations and professional activities in all spheres of the economy, administration, culture, art and social life, and, at the same time, prepares them for further education.

Vocational Secondary School (ISCED 3C, 3A) prepares students for skilled performance in manual trades and professional activities in production and services in all branches of the national economy. The study takes 3 years (ISCED

3C) or 4 years (ISCED 3A). It is possible to supplement the three-year study with another two years and get a school-leaving certificate (ISCED 3A).

Apprentice School (ISCED 2C) is established for children of 15, who do not finish successfully all the grades of basic school. It represents a special type of school preparing the students for trades based mainly on vocational training.

4. *Basic School of Art* is a special-interest education institution which provides education to the young generation away from compulsory school attendance. It offers children and adults the chance to enhance their interest and natural talents in the field of music, fine art, drama and dancing. There are three levels of study: preparatory (for junior pupils of primary school), basic (for pupils of lower secondary school and students of secondary school) and extended (for extraordinarily talented persons).

5. *Higher Education Institutions* (ISCED 5, 6) are based on a three-level system of education (according to the Higher Education Act approved in 2002): Bachelor (3 years), Magister (Master) or Technical Engineer (2 or 3 years) and Doctorate - PhD. (3 years). The Higher Education Institution could be public or private. There is a possibility of establishing separate independent Higher Education Institutions, but most of them are organised in a system of universities.

6. *Schools for National Minorities* are incorporated in a standard school system in terms of both horizontal and vertical structure. Depending on the concrete needs and interests of the members of a particular national minority, they function from pre-school education to higher education. The schools for national minorities are organised as follows:

- schools (classes) using the language of the minority as a language of instruction, while the Slovak language is used as a foreign language,
- schools (classes) using the language of the minority in combination with the Slovak language – bilingual education,
- schools (classes) using the language of the minority in a particular school subject, while the other subjects are taught in Slovak.

In addition to these there are also some various alternative ways of using the language of the national minority.

The Slovak educational system is complex and its educational institutions cover the educational needs of the whole population in each age category and at each level. The network of educational institutions is relatively dense, especially at pre-school level and at the level providing compulsory school attendance. According to data of the Institute of Information and Prognoses in Education (2007) the average capacity of kindergartens is 47 children per institution, and of basic schools 224 pupils per school (school year 2006/2007). Recently the number of children attending kindergartens and the number of kindergartens has gone down. In the 2001/2002 school year there were 150,587 children in 3,243 pre-school institutions. This reduction is caused partly by population decline, but also has socio-economic causes. The OECD Review – An Economic Survey of the Slovak Republic, 2007 (Policy Brief, 2007) says:

Table 4. System of education and training (school year 2006/2007)

Schools and school facilities	State		Private		Church		Total					
	Facilities	Faculties/classrooms, groups	Facilities	Faculties/classrooms, groups	Facilities	Faculties/classrooms, groups	Facilities	Faculties/classrooms, groups				
	Students/pupils	Students/pupils	Students/pupils	Students/pupils	Students/pupils	Students/pupils	Students/pupils	Students/pupils				
Higher education	23	109	124123	8	13	2278	0	0	0	31	122	126401
Special schools	356	3324	30733	8	16	143	12	59	514	376	3399	31390
Secondary schools	472	7138	187088	73	665	14283	13	132	3365	558	7935	204736
Gymnasia	162	2745	80969	30	185	3690	54	535	15272	246	3465	99931
Basic schools of art	187	x	92327	62	x	21274	11	x	3485	260	x	117086
Basic schools	2146	23025	483953	26	149	2305	111	1186	24252	2283	24360	510510
Kinder-gartens	2849	6565	136514	40	87	1545	39	84	1955	2928	6736	140014

Source: Institute of Information and Prognoses of Education

Table 5. Schools and Students according to Language of Instruction

Total	year 2006							Total	total	Number of schools				total	Number of pupils and students			
	Special schools	Second. Schools	Gymnasia	Basic schools	Kinder-gartens	Language of schol						Slovak	Hungarian		Ukrainian	Other		
						Slovak	Slovak - hungarian			Slovak - ukrain.	Hungarian						Ukrainian	Other
6489	442	590	246	2283	2928	total						140014	total					
5701	409	532	218	1985	2557	Slovak	Slovak - hungarian	Slovak - ukrain.	Hungarian	Ukrainian	Other	130807	Slovak	Hungarian	Ukrainian	Other		
177	18	40	7	33	79							8922						
5	0	1	0	1	3							243						
581	15	17	19	252	278							42						
18	0	0	1	7	10													
7	0	0	1	5	1													
997643	33750	213438	99931	510510	140014	total						900000	total					
900000	32204	203772	93954	475389	130807	Slovak	Hungarian	Ukrainian	Other									
59832	1546	9625	5620	34119	8922													
865	0	41	124	457	243													
820	0	0	233	545	42													

Source: Educational System..., 2005

„International evidence shows that early childhood education has a significant effect on learning in subsequent stages of education, especially for children from lower socio-economic backgrounds. Accordingly, the authorities plan to increase participation in kindergarten by making it free of charge for five-year olds from 2008 onwards. A practical difficulty with increasing participation is that kindergartens are not available

throughout the country, especially in poor districts with large Roma populations. The government should ensure that municipalities not offering an adequate supply of kindergartens are financially able to do so and in fact do so. Moreover, efforts should be made to increase participation of children from lower socio-economic backgrounds from four years of age. This would be particularly helpful for Roma children as many do not attend kindergarten but stand to gain much from doing so, notably through greater competence in the language of instruction at school”.

An institutional guarantee of education creates the conditions for raising the level of formal education of the population. It has recently been going up in the case of tertiary education. According to the census in 1980 and 2001, during the last twenty years the number of inhabitants with secondary education has risen about 8%, which means in absolute numbers more than 700,000 people. The number of people completing higher education in that time has risen about 2.5%, which means more than 238,000 people (Kosová, 2005). However, in international terms this is not enough, since the figure of 11% of the adult population (25 – 65 years) having been through higher education (Education at a Glance, 2004) ranks the country low down among OECD countries. On the other hand, Slovakia belongs to those OECD countries which have the lowest number of adults (in a category of people from 25 to 65 years) with only lower secondary education – 14%. Slovakia also has the lowest number of dropouts.

Table 6. Formal education of Slovak inhabitants

Formal education	1980 (%)	2001	2001 (%)
Children up to 16		1 079 853	20.1
Basic and non-finished	51.7	1 132 995	21.1
Vocational and apprentice	23.6	1 264 144	23.6
Secondary (school leaving certificate)	17.7	1 378 077*	25.4
Higher education	5.2	423 324	7.9
Without any education or without any formal certificate	1.8	101 082	1.9
Total	100	5 379 455	100

Source: Pedagogical encyclopaedia ...1985, The census... 2002

One of the general characteristics of the Slovak educational system is its vertical and horizontal selectivity. At the vertical level there is a very early selection of pupils according to their school success – the first at 10 years old, when some of them leave basic schools and start at Eight-Year Gymnasia. The next general selection is before the end of compulsory school attendance – when they transfer from basic to different kinds of secondary schools, where the students finish (in one year) their compulsory school attendance. This selection is amplified by a system of pupils repeating classes if they do not achieve the necessary minimum grades in at least two subjects.

At the horizontal level there is selection based on a system of special schools,

especially special schools established for children with learning difficulties. There are a lot of occasions when children with a socially disadvantaged background (without learning difficulties) are put into these schools (mainly Roma children). In general, there is a possibility of educating these children in ordinary schools, but unfortunately at basic schools there is no real practical possibility for internal differentiation and individualised teaching.

The next problem concerns that small number of dropouts who exist in the educational system. There is a very small window of opportunity for returning them back to the educational process to get the minimal qualification necessary for becoming useful in the labour market. At present these people have little chance of doing so. The system is typically one-track (Kasáčová, Hanesová, 1999).

6. Curriculum, Curricular Policy and Development

The centralised educational system is reflected also in curricular content. In spite of many content changes since 1989, central curricular policy has reminded the same. All the schools, included kindergartens (ISCED 0 – 4), manage a process of education determined by centralised curricular documents devised by the Ministry of Education. They are obligatory for all schools financed from public funds. These curricular documents make up the national curriculum. Compulsory subjects and their content are the same for all pupils and students. There is some possibility of creating individual curricula, but such a move must be approved by the Ministry of Education to be valid throughout the country. The general basic curricular documents are: study plans, framework curricula and educational standards.

The Study Plan defines the amount and structure of instruction in different types of school. There are several alternative study plans for the same type of school. Each of the variants defines the number and scale of obligatory and optional subjects. All schools have a choice from different alternative study plans in terms of grades and classes.

The school year comprises about 185–190 days of teaching spread between September and the end of June (July and August – summer holidays). The lessons take 45 minutes and the subjects are spread over five days a week. The minimum and maximum annual numbers of hours of teaching are from 602 to 831.

The classes are coeducational and in general are made up of pupils/students of the same age. The average number of pupils/students per teacher is around 14. The average class size is 21.4. The maximum number of pupils/students per class is 34, except the first grade at basic school, where it is 29 (Educational system... 2005).

The Framework Curricula define the content and its range for each type of school and for each subject. The curriculum for an individual subject consists of: aims (general and concrete), thematic units and their content and recommendations concerning education strategies and pupils' or students' assessment.

Table 7. The number of lessons according to General Study Plans

Type of school		Number of lessons per week								
		grade 1	grade 2	grade 3	grade 4	grade 5	grade 6	grade 7	grade 8	grade 9
Basic School (Isced 1 – 2)	Total	21	22	24	25	26	28	29	29	29
	Optional Subjects	1 - 2	1 - 2	1 - 2	1 - 2	1 - 2	1 - 2	1 - 2	1 - 2	1 - 2
Gymnasia (Isced 3a)	Total	31	31	31	30	-	-	-	-	-
	Optional Subjects	4 - 6	4 - 6	4 - 6	4 - 6	-	-	-	-	-
Vocational secondary school (Isced 3c)	Total	30	34	34	-	-	-	-	-	-
	Optional Subjects	1 - 2	1 - 2	1 - 2	-	-	-	-	-	-

Educational Standards are also devised for each subject of the particular type of school. They have two parts – content standard and performance standard. Although the standards were implemented in the educational system only in the late 1990s, they do not meet current requirements concerning the function of such a document. In actual fact they copy the framework curricula with an additional requirement concerning the level of knowledge pupils or students must achieve. Most of the standards ignore the development of pupils' or students' competences. From that point of view the standards are dysfunctional, and most teachers perceive them as a formal document without any direct impact on the quality of education. What the teachers usually follow instead are the textbooks. In general, the educational process is very textbook-oriented. Teachers are free to use the teaching methods and textbooks of their choice (from a list approved by the Ministry of Education). Because of this, they concentrate their teaching methods on the transmission of information from textbooks to pupils or students. Public discussion about that approach has already been going on for more than 17 years.

Only teachers are responsible for pupil/student assessment. The system of assessment applies to all primary and secondary schools (ISCED 1 – 3) and is realised in a scale of 5 grades (1 is the best). At the lowest grade of basic schools (ISCED 1) there is the possibility of using alternative forms of pupil assessment if the parents request it.. Assessments are organised throughout the school year (written and oral tests). The pupils/students are given a certificate at the end of the first half and at the end of each school year. If a pupil/student fails in two subjects, she/he must repeat all the subjects of the class once again with younger pupils/students during the next school year.

7. Monitoring and Quality Control

The system of monitoring and evaluating the quality of schools and education at national level has not yet been elaborated adequately. There is no national standard for educational quality at different types of school. Since 2003 a complex monitoring system of educational outcomes at basic school has been gradually elaborated under the designation "MONITOR". It is implemented by the National Institute for Education through written tests in the Slovak language (at schools for national minorities the language of instruction) and in mathematics, taken by all students leaving basic school (ninth grade). In April 2007 at 1,466 basic schools 60,280 students in the ninth grade took the tests.

At secondary schools (ISCED 3A) a new school-leaving examination [*maturita*] has been applied since 2004, partly as a means of evaluating the quality of education. The exam includes two parts – internal and external, and has three levels of difficulty. The students are free to choose one level based on their own interests and further study plans. The external form of the exam makes it possible to compare the quality of educational outcomes in secondary schools.

The results of "MONITOR" and the school-leaving exams could be allowed by secondary schools and higher educational institutions as enrolment criteria. But because of the complicated system of school-leaving exams at secondary schools, most of higher educational institutions do not accept them as their main enrolment criterion.

An ongoing monitoring and evaluation of the quality of education takes place in two ways. The first is carried out by school heads. They regularly observe the instructional process in different classes of their school or give different kinds of test to pupils or students. There are no general criteria and indicators of quality; these tests are fully within the competence of administrators (head teachers). This is a form of self-evaluation.

The State School Inspectorate represents an independent form of school and school facility evaluation. It constitutes an authority of the state administration in the field of education with the purpose of controlling the quality of educational management the educational process and the educational environment at schools and school facilities. The State School Inspectorate carries out an independent evaluation of schools, monitors key aspects of education and publishes its findings in the form of surveys. There are 8 inspectional centres all over the country. Their conclusions concerning particular schools are binding.

Slovakia neither has national standards of education quality and quality of schools, nor any complex report or survey about the real state of its educational system. The only relevant documents are the National Reports about the results of international measurements of trends in children's reading ability – PIRLS – carried out in 2001 by the International Association for the Evaluation of Educational Achievement (IEA) and students' performance in reading, mathematics and science - PISA – carried out by the OECD in 2003 (Slovakia participated for the first time). The results are not very optimistic for the Slovak educational system. They signal

the need for fundamental and complex educational reform.

The measurements show that a Slovak school has a low level of “added value”. This means that it is not able to provide similar levels of school success for children with different backgrounds. Quite the reverse. Differences based on gender or social background are reproduced by the school. Slovakia is among those countries with the highest differences of test results between boys and girls (in favour of boys in mathematics and science, in favour of girls in reading).

One of the most serious findings of the PISA measurement about Slovak schools is the high dependence of children’s test results on their socio-economical background. This means that the Slovak educational system, despite official statements, does not guarantee social equality in the field of education (PISA, 2004). The educational success of the children depends first of all on the level of education received from their parents and their social status. The school actually does not fulfil its compensatory function. It seems that only the kindergarten is able to fulfil this aspect of education under the condition that the child’s school attendance lasts for more than one year.

In most OECD countries the school has a more important effect on the educational results of pupils or students than does their individual socio-economic background. Slovakia belongs to a group of 5 OECD countries with the biggest differences among particular schools.

The problem of raising the quality of education is not only the responsibility of the state administration, but also that of the self-governing authorities of schools and school facilities. They have a wide range of competences which they are not yet able to make full use of.

8. School Autonomy and its Instruments

Simultaneously with the state administration of the school system, the self-administration of the school system works within the law defined by the Act on State Administration and Self-Government. It is understood to be initiative and counselling body, with the objective of expressing local public interests and provide checks at local level. It has an especially strong voice in the process of assessing the candidates for the position of school principal or heads of school facilities. It also presents an opinion about ideas concerning the development and professional orientation of schools and school facilities, about the budget of schools, about the administration and achievements of education. It is organised in a system represented by regional school boards, municipal school boards and school and school facility boards.

9. Educationalists, Particularly Teachers

The main actors in the process of education are the educators and teachers. Their position in the educational system is regulated by law. They are defined

as pedagogical employees with a professional and pedagogical qualification. Teachers from the primary to tertiary level of education (ISCED 1- 5) have to have a qualification at the higher level of university study (a Master's or technical engineering degree). The required qualification of pre-school teachers is at the level of secondary school education (ISCED 3A), but the number of teachers with higher education has been rising. Teachers at primary schools (ISCED 1) are qualified for teaching all the obligatory subjects. The teachers at secondary schools (ISCED 2 – 3) are specialists in two subject areas.

The social status of the teachers is not very high and in recent years has gone down together with the quality of education. The average income in the field of education is lower than the national average income, in spite of the fact that the field of education has one of the highest numbers of employees with a university degree.

10. Support Structures

The structures supporting the educational system consist of the aforementioned school facilities, special education facilities and facilities for education counselling.

School Clubs for Children operate at most basic schools. They fulfil both an educational and a social function, enabling children at the lowest level of basic school a daytime stay at school and to do their homework for the next school day.

Leisure Centres enable children to pursue their leisure interests actively

Diagnostic Centres provide complex psychological and special-pedagogical assessment of maladjusted children placed there on the basis of a court ruling to give them protective education.

Educational and Psychological Advisory Centres offer professional services for schools and families with regard to the education, personal and professional development of children.

11. Social Dimension

Study at all types of state schools is free of charge. At least during their compulsory school attendance pupils and students get textbooks without payment. For pupils and students from small villages without a school, attending the nearest basic school by public transportation, there is a refund of transportation costs by the municipalities. There is also financial support for pupils with a socially disadvantaged background at primary schools. At secondary schools and public higher educational institutions there is a system of social grants for students with good educational results coming from socially weak families.

In kindergartens the parents contribute to the education, meals and teaching aids for their children. In primary and secondary schools and school facilities parents contribute to meal costs; in basic schools of art the parents also cover the tuition fees.

As mentioned above, there is a problem at the pre-school level of education.

Attending kindergartens is not free of charge, though the payment is not high, and for many families the kindergartens are not available. Especially in poor districts with a large Roma populations living in segregated settlements, it could be one of the best ways towards their social inclusion. For this reason, the Ministry of Education started to prepare (2007) legislation allowing five-year-old children to attend kindergarten free of charge.

12. Key Problems and Perspectives

According to the OECD publication "*Economic Survey of the Slovak Republic 2007*" the key problems of the Slovak educational system are characterised as followed: "*Improving education outcomes is vital for achieving convergence with GDP per capita levels in Western European countries and for reducing income inequality. While some education outcomes are favourable, such as the low secondary-school drop-out rate, others have room for improvement: education achievement is below the OECD average and strongly influenced by socio-economic background; Roma children, who are mainly from disadvantaged socio-economic backgrounds, have particularly poor achievement; labour-market outcomes are poor for graduates of secondary vocational programmes not leading to tertiary education; and tertiary attainment is low, albeit rising. Reforms have been made in recent years or are planned to address many of these weaknesses, but much remains to be done. In particular, more progress needs to be made in increasing participation in early childhood education and care, reducing stratification in the education system, helping Roma children to integrate into the education mainstream, and in attracting high quality graduates to teaching, especially in socio-economically disadvantaged schools. In addition, secondary vocational education not leading to tertiary education needs to be made more pertinent to labour-market requirements. Tertiary education also needs to be made more attractive for technical secondary school graduates*" (OECD Economic Surveys 2007).

The Ministry of Education has initiated some professional activities aimed at starting a curricular transformation at basic (ISCED 1 – 2) and secondary (ISCED 3) schools. In July 2007 the National Parliament passed the amendment to the Higher Education Act. Unfortunately, all these activities follow the tradition which has been used for a long time. All the proposed and passed proposals concerning education are based on actual needs, without a serious impact on the quality of the process of education. Root-and-branch educational reform is still not a real national priority.

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STUDENT WRITING

TRENDS IN EDUCATIONAL POLITICS IN THE PROCESS OF TRANSFORMATION OF EDUCATIONAL SYSTEMS IN THE CZECH REPUBLIC AND POLAND

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Abstract: *Fundamental change in education is one of the most important tasks in the process of transformation to an economically developed and democratically organised society. In this paper we study the real effect of transformation in the educational systems in the Czech Republic and Poland. The core of this transformation follows from actions led by the educational politics of these countries, their intentional - whether, rational or irrational - influence on the developmental process.*

Key words: *the Czech Republic, Poland, educational system, educational politics, transformation, curriculum, curricular reform*

1. Situational Base of the Comparison

"Many people believe that the prosperity of any country largely depends on its political and educational system. There is not much exaggeration in such an idea. Many people in Poland would also say that during socialism the educational system, compared to the political system, was not that bad. What education do we have now? How does it work now in the new social, political and economic environment, created by a market economy?" Those are questions formulated by Ireneusz Bialecki, the editor of the background report for the OECD review - *Education in a Changing Society* (1995). The common basis of both countries, the Czech Republic and Poland, is the relic of the previous communist regime. While clarifying difficulties which the reforms in these countries still meet (and will meet in future) this factor can be considered the most significant.

"A wide range of aspects of this heritage can be identified, most of them of a sociological nature and falling under the heading of inertia of acquired attitudes and behaviour patterns. (...) In general, it is estimated that the innovative sector is only a small minority, perhaps 15 to 20 per cent of the population. (...) "the authors of the background report for the OECD review, this time for the Czech Republic (1996), say. "It is necessary to realize that the sociological forces and resistance require, almost by definition, a long time to be attenuated and they can only lose their impact very gradually." These quotations refer separately to situations in

different countries. Nevertheless they correspond symptomatically and together they make a logical statement describing the same transformational process.

Since the political takeover in 1989, the society and economy of both countries have gone through complicated structural changes. Those changes consequently require deviation from the centralised model of education and create an expectation of fundamental change in educational policy. The changing nature of society, the new social structures and the dynamic quality of the economy influence the educational and qualification demands of the labour market. This has an impact on the structure of education and on the role of education in society. Investment in education is beginning to prove its worth economically through greater working efficiency and competitiveness. The one goal of both educational systems is to face the demands which the new knowledge society requires.

After 1989, connected with the economic and social development which was to restore an economy broken by decades of communist supremacy, a natural need for long-term planning appeared. „The end of the post-revolutionary decade leaves in its wake the idea that education, in a democratic society with a market economy, develops absolutely spontaneously, depending only on the current economic progress of the country and on the currently existing will of political representatives” (Kotásek 2000). There is no doubt that education can not develop progressively without consistent planning and evaluation of changes. Unlike an economy, education cannot be improved by shock therapy. Investment in education will show itself retrospectively after a longer period. The effects, though, are permanent and have a long-standing impact on society.

Obviously, both countries have found the same roots of change in the totally changed political and economic situation in the 1990s. They also have the same short-term and long-term goals of development. It is clear that the typical characteristics of educational systems are an extremely high level of inertia and an unusual resistance towards change. Their transformation therefore requires an enormous effort and political resolve. As we will show later on, both countries decided for similar reform strategies. Compared to the Czech Republic, Poland shows a faster rate of implementation of changes. Taking on board the Polish approach seems to provide a unique opportunity especially for the Czech Republic which aims for a qualitative change in its education in a very similar context.

In this paper, we study the real impact of the educational policy of the chosen countries on education. We show the necessity of the implementation of educational politics in terms of priorities for all of society. The effects of educational policy are indicated by qualitative analysis of both the current and the previous condition of education. This means focusing on the real changes put into practice in organisations and in the teaching process. As a tool of educational policy we consider the strategy programs of national educational development. These documents are usually processed by the Ministries of Education and introduced for public consultation and to be accepted by the government and parliament. School policy is then implemented through school legislation and appropriate bodies with the powers to do so. We will examine those in particular in what follows.

2. Current Educational Systems (Field of Compulsory Education) Viewed as the Effects of Educational Politics

The very first glance at their respective educational systems reveals a fundamental difference between the two countries. That is the duration of compulsory education. While school attendance in the Czech Republic is compulsory for nine years, Polish compulsory education lasts ten years! Poland prolonged compulsory education in 2004 by introducing "year zero". Six-year-old children are obligated to attend a preparation class for primary education at a pre-school (*przedskole*) or at a pre-school-class of a primary school. The age for beginning compulsory school attendance is now the same as in the Czech Republic. The education of six-year-old children is stressed as the consequence of an effort to equalise educational opportunities through reducing the influence of social factors and an academic failure. This step seems to be logical, as we know that pre-schools contribute to raising the social and cultural development of children and they form basic conditions for children's future education. This step was taken also as a reaction to the course of Polish pre-school education at the beginning of the 1990s: unemployment in Poland increased as a result of economic reforms and therefore the period during which parents could stay home taking care of a baby, receiving financial support from the state, was prolonged. However, this regulation led to a decrease in pre-school attendance and consequently this was reflected by a decrease in the number of pre-schools, especially in rural areas. It showed that those children who did not attend any pre-school were less successful later during their school attendance, with a variety of negative impacts on their future education.

In the Czech Republic, on the other hand, pre-school attendance is not compulsory. The state only supports improving the uneven development of children before primary education and offers early care for children with special needs through legal regulations. According to the law, children who are at preschool age have to be accepted into kindergartens. Furthermore, there is a possibility of establishing preliminary classes at primary schools for preschoolers who are socially disadvantaged. The Czech Republic then only creates possibilities for equal chances in primary education, while Poland in this case resolutely pushes ahead its educational politics in order to consistently equalise the educational opportunity of pupils.

Another feature that distinguishes both educational systems is the compulsory school education trajectory through primary and lower secondary level. As we mentioned above, Polish compulsory education includes the zero grade for all pupils, six years of primary school (*szkola podstawowa*) and three years of lower secondary school (*gymnazjum*). Compulsory education in Poland is thus outlined in three main phases. The education of six-year-old children covers stimulation of their general development and teaches them basic skills in reading and math. The following six years aim to develop children's powers of self-expression, reading and writing, the ability to solve arithmetic problems, to use simple tools, to develop

habits of social life, develop cognitive abilities and aesthetic and moral sensitivity. This period is divided into two stages. Teaching at Stage 1 (grade 1 to 3) is integrated, Stage 2 (grade 4 to 6) is arranged according to subjects and it also includes cross-curriculum topics. Finally, the aim of *gymnazjum* (compulsory secondary education) is to introduce the pupils to the world of science by means of teaching languages, concepts, theories and methodological characteristics of given disciplines. For the comparison with the Czech Republic, it is important that this Stage 3 is attended by all children without any exceptions.

Czech children start their compulsory school attendance at primary school (*základní škola*) which splits into five years at the First level and four years at the Second level. Those pupils whose parents apply for *víceleté gymnázium* (multi-year gymnasia) and who pass the entrance examination can finish their compulsory education there starting from grade 6 or 8 (see below). The aim of the First level is to create conditions for lifelong learning. This means acquiring basic habits and skills, motivating children to learn and to gain basic literacy as a tool for further successful education. The main aim of the Second level of primary education is to give the pupils the best fundamentals of a general education. However, *víceleté gymnázium* in the Czech Republic traditionally and purposefully prepares only talented students, mainly for continuing studies at the university. Compared to *základní škola*, the role of *víceleté gymnázium* is one of social exclusivity. It gives preferential treatment to a limited part of the population and guarantees an easier way of studying in the upper secondary and tertiary sphere. This reduplication at the lower secondary (compulsory) level of education thus introduced selectivity into the Czech education system. This early selectivity (about 10% of pupils go to *víceleté gymnázium* when they are eleven years old) is a source of constant criticism on the grounds that selection is based on the economic and cultural status of the child's family rather than the real intellectual abilities of the child. Nevertheless, the new Education Act from 2004 reconfirmed *víceleté gymnázium* in spite of recommendations formulated in the *National Program for the Development of Education*: „To coherently reduce programs of *víceleté gymnázium*. To confirm this arrangement in legislation and to consider it as one of the main changes to the whole education system.“ On the other hand, entering compulsory secondary education in Poland is not a selective process. There is only one requirement for acceptance: finishing primary school with a final report.

If we introduce this comparative analysis by looking at the initial phase of school attendance, the third important parameter of compulsory education in the compared countries seems to be the possibility of moving on to higher secondary education. In the Czech Republic, the criteria for achieving the sphere of post-obligatory education are the outcomes from *základní škola* (expressed by Final report and Final certificate) and the results of an entrance examination (if there is one). The pupils take the entrance exam at the school they apply to. The form and content of the examination are set by the head teacher of the particular upper secondary school. In Poland, the number of points from an external standardised examination taken at the end of the grade 3 of the *gymnazjum* (the end of compulsory

education), and the points received during the *gymnazjum* examination (based on results achieved in chosen areas of study and other achievements), determine the pupils' admission to an upper secondary school. The admission rules are defined by educational activities which become the basis for the calculation of points, determining rules for the calculation of points and for the minimum numbers of points to be gathered in chosen study areas and for additional achievements. The obvious contrast between both systems is that there exists a standardised tool to evaluate admission to the post-obligatory sphere of education in Poland and that is the final examination. However, the debates about a centralized evaluation of pupils' results at the end of grade 9 which would be acceptable to secondary upper schools in the Czech Republic are endless.

The efficiency of the educational systems described above can be seen for example on PISA, the international assessment of the results of 15-year-old pupils shown on following table:

Table 1. National average scores in PISA 2003 tests for Poland and the Czech Republic

Year	2003		
	PL	CZ	difference
Reading literacy	496	489	-7
Scientific literacy	497	523	26
Mathematics	490	516	26
Solving problems	487	516	29

Source: Database of OECD PISA, www.pisa.oecd.org

3. On the Way to Change: The Tools of Educational Policy

There is no doubt that the main elements in the process of transformation have already been already implemented in both countries. Remarkable success can be seen in the transformation from close and uniform systems to open and plural ones, in the depoliticalization of education, the breaking of the state monopoly and, decentralisation in managing the system of education. Powerful changes in the early 1990s eliminated ideological distortion and a false historical view from the state-controlled curriculum. They restored religious education. The status of the Russian language was changed and new foreign languages were introduced into the curriculum. Responsibility for the administration of education was divided between the ministry and regional and local government. The possibility for private subjects and institutions to access education was established. These changes facilitated innovative development. They were fully successful in a very short time and they are evident to this day. No further reform has brought such considerable progress or such noticeable effects.

Yet education reform in the Czech Republic did not keep up such progress for a long time. It lacked an explicit conceptual foundation – an integrated educational

policy. One of the negative aspects was the continuing absence of an efficient statutory norm. The School Act of 1984 was not completely replaced until 2005! It had been repeatedly amended and the consequence of this situation was the loss of transparency, logical cohesion and overall strategy. The most important legislative changes in the field of compulsory education (for the needs of this paper) were the introduction of compulsory school attendance for nine years and the introduction of *víceleté gymnázium* in 1990.

A new Education Act in Poland was adopted in November 1991 as the result of a debate about national educational goals. The principle of an individual pupil's development was identified as a priority. The Act did not introduce any fundamental changes in the structure of the educational system or the curriculum; on the other hand it facilitated some formal moves to empower civil and local initiatives to determine school life. The Act about the Implementation of the Reform of Educational System, January 1999 was a significant change. Structural modifications were made to the education system, including the introduction of the *gymnazjum* as a brand new type of school which was the most visible change and became a symbol of the whole reform. It was decided that the previous structure of education (eight years of primary school connected to four years of high school or three years of vocational school) would be replaced by the „6+3+3” system. This means that primary education was reduced to six years and pupils continued at a three-year *gymnazjum*. *Gymnazjum* followed by three years of upper secondary education at a specialised lyceum or by two years at a basic vocational school.

The different conceptions of the structures of educational systems in both countries are obvious. In Poland, they de facto united the sphere of compulsory education: a pupil makes a decision regarding continuing education after an appraisal made at the age of 16. What is more, the phase of *gymnazjum* study is accessible to all pupils. In the Czech Republic, the structure of compulsory education was broken up by introducing *víceleté gymnázium* in 1990.

Yet there were also doubts regarding structural reform in Poland. There were two arguments explaining the benefits of reform. Firstly, the new layout of school stages would facilitate modification of teaching methods and the curriculum according to pupils' specific needs and age. Second, structural reform should be followed by curricular reform and support it significantly. Until then conservative teachers had been in a rut and had not responded to appeals to show new quality in their work. However, structural reform could not be ignored so easily. As the Polish Ministry anticipated, it would be difficult to use the old methods in new schools. And thus the reform would offer an impulse to deep reflection inside the teachers' community and it was expected to create a positive change in curriculum and in teaching styles.

In the Czech Republic, there were many initiatives towards educational reforms. Nevertheless, the lack of political will to push through the ideas that could become a base for the formulation of educational policy goals is characteristic of the 1990s. Since the mid-1990s many studies have appeared. The most comprehensive materials are *Budoucnost vzdělání a školství v obnovené demokratické společnosti*

a ve sjednocující se Evropě (The Future of Education and Schooling in a Restored Democratic Society and in Uniting Europe, edited by J. Kotásek at the Faculty of Education, Prague) and *Svoboda ve vzdělání a česká škola* (Freedom in Education and the Czech School, NEMES). In 1994, MŠMT ČR (The Ministry of Education of the Czech Republic) came up with the document *Program rozvoje vzdělávací soustavy České republiky – Kvalita a odpovědnost* (The Development Program of the Educational System of the Czech Republic – Quality and Responsibility). In this paper the principles of new curricular policy were defined for the first time, but this document was left as a statement of intent. In 1995 *Standard základního vzdělávání* (The Curriculum Standard for Compulsory Education) was introduced and presented a basic framework for a school in the context of a decentralised school system by formulating educational goals and content through a core-curriculum. In 1996 – 1997, the Standard was worked up in three accredited educational programs *Obecná škola*, *Základní škola* and *Národní škola* which replaced the existing curriculum and educational plan.

In 1995 a review for the OECD, *Proměny vzdělávacího systému v České republice* (Changes to the Educational System in the Czech Republic) was an important source of inspiration for educational policy in the Czech Republic. It was followed by *Zpráva examinatorů OECD o vzdělávacím systému v České republice* (The Review of the Examiners of the OECD about the Educational System in the Czech Republic, 1996) and the analytical study *České vzdělávání a Evropa – strategie rozvoje lidských zdrojů v ČR při vstupu do Evropské unie* (Czech Education and Europe – the Strategy of Human Resources Development in the Czech Republic on Entering the European Union, 1999). Some important requirements and suggestions for the educational system were powerfully formulated in those documents. A crucial turning-point in the process of transformation came finally with *Národní program rozvoje vzdělávání – Bílá kniha* (The National Program of Education Development 2001), which contains a key outline of future educational development. This document was negotiated by the government and defined solemnly the main strategic directions of Czech educational policy.

The aims of the transformation of the Polish educational system come from a government Bill concerning social and economic policy entitled *Strategia dla Polski* (Strategy for Poland) from 1994. A parliamentary debate based on the document *Directions for Improvement of the System of Education in Poland* preceded the Strategy in May 1994. In the section named *Investment in Human Resources* the document contains a diagnosis; it identifies the main goals, sources, threats and the main efficiency criteria of the educational system. In the section devoted to diagnosis it is claimed: „Persistent low expenditure levels on education and science are now the main obstacle to restructuring the Polish economy...” The program empowered the Ministry of National Education to propose to the government the most important tasks and to suggest solutions. In the subsequent document *The Ministry of National Education Policy in the Field of Human Resources Development, Achievements, Projects, Barriers* (December 1995), some relevant tasks are formulated. There is, for example, the suggestion of establishing the compulsory education of

six-year-old children. In the sphere of improving the quality of education a core-curriculum is proposed which would define the principles of general education through priority goals. There is also an introduction of an alternative curriculum which will illustrate the fulfilment of educational tasks mentioned in the core-curriculum. At last the document contains the preparation and implementation of the reform of the system of evaluation and assessment.

The identical component of both education systems is the focus on the curriculum. Related to the White Paper, the accomplishment of curricular projects became the priority in the process of Czech compulsory education transformation. The Ministry of Education has worked up the strategy and method of carrying out the reform and modernising educational goals and content in *Dlouhodobý záměr vzdělávání a rozvoje vzdělávací soustavy České republiky* (The Long-term Intention of Education and the Development of the Educational System of the Czech Republic, March 2002). The reform consists of dividing competencies and responsibilities for the content of education between the centre and the schools. The key concept is the Framework Educational Program (RVP), a national document according to which every school develops its own School Educational Program (ŠVP). The Framework Educational Program emerges from a new approach to compulsory education. This is based on providing a set of key competencies to pupils instead of an obsolete stress on acquiring a huge amount of information by heart. The Framework Educational Program is expected to create some positive tendencies in teaching. For example, the individual needs and abilities of pupils should be taken into account, in order to introduce more variable organisation and individualisation of teaching, creating a positive social, emotional and working atmosphere. It should also stimulate changes in pupils' assessment, carrying it out on continuous assessment basis, using norms tailored to the individual and with greater use of verbal assessment. The Long-term Intention 2002 also specified the timetable of the preparation of the Framework Educational Programs and their implementation, including the network of pilot schools and creating the support system for extending teacher training.

The new concept of core-curriculum was accepted in Poland in 1998 after many years of complaints about an overloaded curriculum. The concept was developed in 1990, a time when Polish schools were facing a critical lack of money. In that situation the schools had to make some reductions in their teaching plans. Therefore the Ministry of Education had to define at least the minimal curricular requirements.

The core-curriculum defines the knowledge and skills for each of the three educational stages which must be adopted by all pupils. In other words, it is the results and outputs of the teaching process that is important. However, it leaves it up to schools how they obtain those outputs and thus it offers autonomy and responsibility to schools. The reform totally changed the rules and the statutory framework that defines what must be taught in Polish schools. The new mechanism is expected to strengthen school and teacher autonomy and it should create conditions for fast and flexible responses to local needs. Schools are free to decide

what methods to use to obtain the required educational results.

Those changes introduced new terminology in Polish education: 'integrated teaching', 'educational pathway', 'teaching in blocks'. Another notion frequently used in official documents, "educational activities", refers to the delegation to schools of the right to organise their work using different approaches outside the traditional apportionment of school time. There is a clear effort not only to implement changes in organisation and teaching methods through the core-curriculum, but also to change the whole conception of teaching and school culture.

4. The Current Situation

According to the new Educational Act, the Ministry of Education of the Czech Republic is working on a long-term plan of education. The plan is evaluated every two years and is adapted if necessary. The new *Dlouhodobý záměr vzdělávání a rozvoje vzdělávací soustavy ČR* (The Long-term Strategy for Education and the Development of the Education System of the Czech Republic) was presented to the government in the first half of 2005. The material reflects the main planning documents and their implementation in each period. It sets such tasks for the next two years as can be managed. Curricular reform is still a priority. The processing of *Manuál pro tvorbu školních vzdělávacích programů* (The Working Manual for School Educational Programs) is noted as well as the adoption of a system developing program co-financing through the European Structural Fund.

In the school year 2005/06 the Czech School Inspectorate evaluated the preparation of School Educational Programs at primary schools and the state of preparation of head teachers and teachers for new tasks. The Inspectorate found that preparatory work had begun in all the schools they visited. The range and intensity of activities connected to curricular reform were slowly increasing. 9% of schools (out of the 22.4% of schools registered in the Czech Republic) visited by the Inspectorate had their School Educational Program finished and one third of them were piloting the Programs in the teaching process.

In 2005 Stálá konference asociací ve vzdělávání (SKAV, The Permanent Conference of the Association in Education) presented an analytical text *Vymezení hlavních problémů ohrožujících realizaci kurikulární reformy* (The Delimitation of the Main Problems Threatening Curricular Reform Implementation) in order to show the problematic parts of the curricular reform and any discrepancies in it. Among other things they mentioned: „We see a risk in insufficient coordination of the detailed components of the curricular reform. According to our point of view, the unsatisfactory coordination of curricular reform with other stages of educational policy threatens the prospect of success.“ *Institut pro sociální a ekonomické analýzy* (ISEA, The Institute for Social and Economic Analysis) developed during the same year an extremely critical study *Na cestě ke znalostní společnosti. Kde jsme...?* (On the Way to a Knowledge Society. Where Are We?) The aim of the study was to eliminate the illusion that the problems of Czech education have been satisfactorily solved. The authors state that „no fundamental reform has been introduced, let alone

implemented, since the White Paper was published. Until now, all the authorities have underestimated the strategic importance of the development of the educational system and the relevancy of educational reforms." The role of the White Paper is questioned by a statement that there is a false presumption that the Czech educational system has already got its strategic document. Yet the White Paper does not oblige the Ministry to take any action. A year later, the president of the Czech Republic, Václav Klaus, mentioned it in an interview for *Učitel'ský zpravodaj* (Teachers' Newsletter, 4.9.2006): „I can not see any serious reforms of our education around me. Those formal administrative changes are out of my horizon.“ (!)

The most current impetus for Czech education comes from the promise of the government parties ODS, KDU-ČSL and SZ incorporated in their *coalition treaty* from December 28, 2006: „We will continue with free primary and secondary education in the standard range. We will guarantee equal support to all schools, no matter who established them, as education is a public service for all. We will finish the Framework Educational Programs and only then will we connect them to the introduction of the state *Maturita* Examination.“

The Polish *Institut Spraw Publicznych* (ISP, The Institute of Public Affairs) has carried out a lot of qualitative research into the transformation of the educational system after introducing the reform in 1999 called *Monitoring of the Educational Reform in Poland*. The project was financed with the support of the Ministry of Education carried out from 2000 to 2004. The basic work method to use a representative sample of primary and secondary schools. It studied one of the aims of the reform – reaching a higher standard of education and schooling. The authors note in the final report *Recommendations for Educational Policy after Three Years of School Reform*: „The institutionalization of the core curriculum may be helpful. This important, yet consistently marginalized document will be able to play its expected role in education only if it is the subject of ongoing, unrestrained discussion among experts. For this purpose a curriculum committee should be established, reporting to the Ministry of Education, consisting of scholars and practitioners.“

The current developing document, compiled by the Polish Ministry of Education in August 2005, is *Strategia Rozwoju Edukacji na Lata 2007 – 2013* (The Strategy for 2007 – 2013). A very interesting feature is the SWOT analysis of the educational system. As strengths within the sphere of compulsory education progress in reading literacy (based on tests PISA) and the development of school network are mentioned. Further planned developments are the regulation of the textbook market, introducing English as a compulsory subject from grade 1 and reaching European language standards. There are also plans to support the quality of education in rural areas, establishing a National Institute of Education and creating a quality system of financial support for education. It would be interesting to analyze in detail both ministry documents that were introduced at the same moment. Such an analysis is, however, beyond the scope of this study.

In May 2006, the Ministry was administratively split into the Ministry of National Education and the Ministry of Science and Higher Education.

Over 12,000 teachers from Poland came to Warsaw in March 2007 to protest

against the policy of the minister of education Roman Giertych. As the media said, Giertych caused hostile reactions from teachers, students and parents by a reform called Zero Tolerance, which had already been adopted by the Parliament. Beside other things the reform introduces obligatory school uniforms, limited use of mobile phones and camera systems in school buildings.

5. The Role of 'Executive Subjects' in the Realisation of Educational Policy

After the state school administration was decentralised in the Czech Republic during the reform of public administration, the development of a tool for maintaining a consistent state school policy is the long-term aim of education and of the development of the educational system. The Ministry publishes its long-term intentions every odd year. After discussion with the regional authorities the document is proposed to the government which passes it to the Parliament. Each year, the Ministry submits an annual report on the development of education. It takes into account the annual reports which are prepared by the regional authorities. The annual report for 2005 is symptomatically called *S novým školským zákonem* (With the New Educational Act). It sums up in dates and subjects the first year with the new school legislation.

The regional authorities work up their long-term intention for their territory. They take into account the long-term intentions of the Ministry. This two-layered system of mutually linked documents of school policy has a lot of potential as an important communicative tool mediating between the centre and the regional authorities. The impact of the regional long-term intentions (as the new tools of strategic management of education system) on the local sector "is not possible to evaluate as they have only been working for a short time. However, we can state that the awareness of schools and their partners rose rapidly in the last school year." notes the Czech School Inspectorate in its *Annual Report for the School Year 2005/06*.

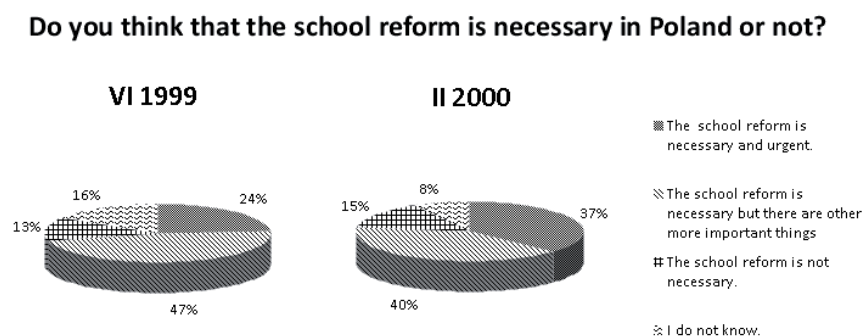
The educational policy in Poland is implemented centrally. The Ministry has the main role in initiating policy and management. The Parliament is responsible for the final edition of documents that determine the orientation of educational policy. The main school body at the regional level (16 *województwo*) is *kurator oświaty* who carries out the policy of the Ministry. The Ministry implements state educational policy in cooperation with the regional authorities. *Kurator* is responsible for cooperation with local self-governing bodies when making and implementing educational policy (consistent with state policy) at regional and local level.

6. Reform of Polish Education: Inspiration or Memento for the Czech Republic?

Both mentioned educational reforms determine state goals. The basis of the transformation effort is to increase the quality of education connected with an effort aimed at internal changes and at overcoming traditional school attitudes. These can be seen in the new school organisation and teaching methods. The final receiver of these values is a particular child, participant in compulsory education. The initiation of teaching according to the school educational programs is confirmed in the Educational Act of the Czech Republic. It will start in the school year 2007/08 at 1st and 6th grade. This means that the curricular reform of primary and lower secondary education will be completed in 2011/12. The large structural and curricular reform in Poland started in 1999/2000 and was formally finished by the end of 2005/06. Those collateral reforms offer a large area for comparative research. It might give the Czech Republic some experience and practical assistance from a comparable state and opportunities to improve processes and procedures within its own system.

For example, the degree of advance awareness of the school reform in Poland was very low in the year 2000 according the research of CBOS (the Centre for Public Research): 57% questioned people answered that they had heard about the reform, yet they did not actually know what it was about. 14% admitted that they knew nothing about the reform at all and only 29% said they understood its principles. The school reform was identified as necessary by 37% respondents from 1100, which is a 13% increase compared to the year 1999 (see Figure 1).

Figure1. Public perceptions of school reform in Poland



Source: Centrum Badania Opinii Społecznej, <http://www.cbos.pl>

Nevertheless, the research data from the following year (2001) indicate that the level of satisfaction with the reformed school system operation varies and negative

attitudes predominate. As table No. 2 from the year 2001 shows, 37% out of 1069 randomly questioned people rate the previous education system a better one.

Table 2. Level of satisfaction with the reformed school system operation in Poland

Do you consider the operation of the school system better or worse than before the implementation of the school reform?	The answers of respondents according the terms of a survey					
	VI 2000		X 2000		I 2001	
	%					
Much better	1	16	1	12	2	14
Slightly better	15		11		12	
Neither better nor worse	23	23	27	27	26	26
Slightly worse	22	35	20	38	24	37
Much worse	13		18		13	
I do not know	26	26	23	23	23	23

Source: Centrum Badania Opinii Społecznej, <http://www.cbos.pl>

According to the research of SOÚ (the Sociological Institute of the Science Academy of the Czech Republic) from March 2006, the public is quite satisfied with primary and secondary education. „The majority of citizens do not feel any need of reforms in the field of primary and secondary education. Only 36% from 1076 respondents were in favour of reform.” The cultivation of general competencies was recognised as a priority by 16% only.

The following statement, which is worthy of further research, contradicts the developing programs of educational politics and the rigid statistics of Eurydice that are not able to say much about the real transformation processes in real schools: „It is naive to suppose that it is enough to redefine the educational goals, to set up a new curriculum or to reformulate teachers' working competencies and requirements to change their way of thinking and behaving or their beliefs.” (Thurler, 2005, p. 117). The transformation of school culture is, according to the author, a more or less voluntary act. No central mechanisms of any political kind could orientate school culture towards openness to changes. Each innovative attempt will be inescapably confronted by the conviction, views and impact of the teachers themselves.

One of the basic sources of failure is the resistance which teachers show against any effort to change their practices. All projects were finally subordinated to the reaction of the mass of teachers. Those reforms coming from above often threaten the sense of worth which the teachers have in their work and their everyday professional and personal life. The proclaimed space for initiative and involvement in school decisions, planning and other matters will probably collide with the different opinions of people facing Herculean tasks of reform.

The structural reform of Polish education hopes that the fact that the external influences are so strong will change the orientation and the main goals of education

and replace the old values and norms. This model assumes that teachers' identify with the new culture, take it to heart and acquire the values which the reform exhorts them to adopt. However, as Prokop (2002) says, only 15% of teachers promote at least one half of the reform demands. One half or more of the reform projects are rejected by more than 70% of teachers. 56% indicate that their colleagues do not accept the reform. 64% required the whole reform to be stopped. About 20% teachers assume that there will be very few changes at schools in spite of the reform.

Kalibro, the questionnaire from May 2005, offers data about how the curricular reform is perceived by Czech teachers and how they assess the suggested innovations.

Table 3. Perception of curriculum reform in the Czech Republic

Formerly, not teachers but the state was responsible for the curriculum. Nowadays it seems that a part of the responsibility will be delegated to the teachers. Do you welcome this change?	61.4%
Do you expect that the curriculum will be changed in your teaching subject at your school with the beginning of reform and the school educational program?	68.8%
Do you expect to change your own teaching approaches and methods due to the reform and the School Educational Program?	42.8%
Are you excited and qualified enough to influence constructively the conception and aims of education in your School Educational Program?	56.7%

Teachers' opinions taken from The School and Me. N = 4206. The numbers are of those replying 'yes' to each question.

Table 4. Head teachers' opinions about the curriculum reform in the Czech Republic

Do you expect that the curriculum will be changed in the majority of teaching subjects at your school through the reform and the School Educational Program?	25.4%
How many teachers, in your opinion, will be willing and able to change radically their teaching approaches and methods in the light of the reform and the School Educational Program?	51.5%

Head teachers' opinions taken from The School and Me. N = 350.

To sum up, there still exist a risk that current goals, norms, opinions and behaviour patterns of the main players in the reform, teachers, will remain deep-rooted. Enforcement of the new educational paradigm will not be then practicable.

7. Instead of a Conclusion: The Current Paradigm of Educational Policy seen through the Prism of the Past

Formally, contemporary educational reform consists of way of administering the administration of official curricular documents (the Czech Republic) and of the structural arrangement of the educational system (Poland).

The author of this paper considers it worthy of note that the priorities of the educational policy in the transformation process of both countries show (with few differences) periodical aspects. They could be paraphrased using the following quotations:

“The institutions of the educational system should be the main forces working to meet contemporary challenges for the programme of far-reaching reforms to be implemented in the People’s Republic of Poland.” (The Ministry of National Education in *Report for the International Office in Geneva for the 41st Session of the International Education Conference*, Warsaw, 1988.)

„The new structural arrangement of basic education is ensured through the individual approach to pupils in teaching process, the respect for the different development of all pupils, the use of cooperative teaching. (...) Compared to the existing traditional teaching, focused on conning by rote and the mechanical reproduction of the curriculum, the basis of the educational work of basic school consists of the systematic development of active and creative work by pupils.” (*Following Development of Czechoslovak Educational System*, 1976).

The statements mentioned above thus induce concerns about the content of educational policy being only promising rhetoric instead of true effort for real change throughout society.

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IN MEMORIAM JIŘÍ KOTÁSEK



Jiří Kotásek belonged to a generation of Czech educationalists whose lives and professional careers were significantly influenced by historical events and the development of Czech society in the 20th century. It was particularly the second half of the century, when his scientific career was launched, that presented for Jiří Kotásek a period of disappointment and injustice. This was caused both by the social conditions in Czechoslovakia at that time, which were even made worse by the Cold War, and by the bipolar division of the world which paid no regard to his qualities as an expert and gave him no credit for developments in his field. Utter humanist and convinced European though he was, this brought considerable

complications and restrictions and for some time even disqualification from the scientific life and activities of a university teacher, which he considered more of a mission than profession. A great opportunity for using Kotásek's scientific and educational erudition came in the last decade of the century. It was a time when most people would have left active professional life for another and enjoyed retirement. But let us go back to the beginning.

Jiří Kotásek was born on December 2, 1928 in Brno. He spent his childhood and his student years there. In the Czechoslovak Republic, in the time before Munich, he (as a pupil) experienced primary (*obecná škola*) and secondary school which he later on described as traditional but admittedly of a high standard, influenced by the pre-war atmosphere when the meaning of the notion "homeland" evoked special feelings and when education was dominated by the national dimension. When he was 11 years old, he learned to feel the sufferings of his nation both emotionally and rationally and to hate the occupation, as did other members of his generation. Entering university after the war and completing his studies at the State Institute for Male Teachers (*Státní mužský učitelský ústav*) was for Jiří Kotásek an introduction to the academic world, to its freedoms and demanding requirements for intellectual output as well as an encounter with the power and totalitarian structures which infiltrated into academic life. At that time, however, he personally was not directly affected by these complicated circumstances. He did not perceive them very much during his studies; he realized them later in the 1950s. After finishing his studies at the Faculty of Education of Masaryk University, he was briefly a biology, geography and social sciences teacher in the second and third stage of school (lower secondary and upper secondary level of education).

He came back to the Faculty in 1950 as an assistant professor. In 1950 he received a minor doctoral degree in educational science and psychology. He was accepted onto the program of continuous preparation for scientific work at the Higher Institute for Education in Prague (*Vysoká škola pedagogická*). In 1958 he received a post-graduate academic degree after defending the thesis *Acquiring Biological Laws in the Educational Process* (*Osvojování přírodovědných zákonů ve vyučovacím procesu*). In the first period of his scientific work, he concentrated on teaching methodology and he published studies on the teaching methodology of the natural sciences. Research in the context of Soviet studies, especially on educational psychology, and papers by German and Polish educationalists, made him turn to the methodological problems of educational science, particularly to the issue of empirical research in the educational process. He also started to be interested in educational reforms, particularly in the Swedish reform which reflected the model of the social state.

From 1961 on, Jiří Kotásek worked at the Institute for Distance Study Programs of Charles University, later called the Institute for Teacher Training of the Faculty of Education of Charles University. He combined his activities as university teacher with intensive scientific activities in which the focus on theoretical and methodological issues prevailed. Apart from that, Jiří Kotásek was involved in writing university textbooks on teaching methodology and educational science as co-author, and he also wrote several chapters in the textbook for teachers at secondary vocational schools and for instructors of vocational training. In one of his research lines, he was still concerned with issues of teaching methodology. Later a second line of research focusing on education and learning processes in adult age became of interest to him. He devoted his habilitation thesis *Contributions to the Theory of Adult Education* (1965, *Příspěvky k teorii vzdělávání dospělých*) to the concept of lifelong learning as a subject in educational theory. The period of political liberalization allowed him to be more distinctly focused on Western theories of education and experience. He undertook several study trips at that time: to Denmark, Austria, Great Britain and the Federal Republic of Germany. He was involved as a consultant in UNESCO and was the team leader of an international project concerned with issues which were connected with the system and content of teacher training, using international comparisons as its basis. He presented the results of this project at an international conference of experts in 1967. Connecting the issues of university teaching methodology and adult education, he approached questions of teacher training and its organisation which became a permanent interest and which also constitutes a significant part of his personal bibliography. Kotásek's works on lifelong learning and adult education received international recognition and acceptance. Later on, these studies were used as one of the bases for elaboration of the essential UNESCO publication *Learning to Be* edited by J. Faure and published in 1972. Paradoxically, Kotásek's comparative studies *Current Problems of Teacher Education* (1970) and *L'idée d'éducation permanente dans la réforme actuelle des systèmes éducatifs et de la formation des maîtres* (1972), published and quoted abroad, were

forbidden publication in the Czech language at a time when the mechanisms of 'normalisation' were already in operation.

In the second half of the 1960s, when the social atmosphere loosened up and culminated in the Prague Spring in 1968, Jiří Kotásek was given two further great opportunities. He made use of them with profundity common for him. Kotásek's organizational and conceptual activity in the Pedagogical Society was an important part of his scholarly life. The Czechoslovak Pedagogical Society (ČSPS) was founded in 1964 as an academic association of research workers, publishing university teachers and school experts. Jiří Kotásek became its scientific secretary. He participated in constituting the association's profile, formulating its status and defining the program of its scientific activity. At that time, the Pedagogical Society significantly influenced the scientific methodology and direction of Czech educational science. It worked on a decentralized basis having active branches throughout the whole of the republic. Right from its inception, ČSPS emphasized the significance of education as a powerful instrument of social change, the importance of a scientific basis for political decision-making about education and the necessity for scientific freedom in educational science. It rejected ideologically dogmatic pedagogy. In the following years (1965 – 1967), ČSPS carried out a critical analysis of post-war Czechoslovak educational development on the basis of international comparisons. It focused on fundamental theoretical and methodological problems in educational science, and it introduced Comenius's *General Discourse* to an international milieu. Jiří Kotásek was actively involved in all those activities and he applied his scientific erudition to them. After the Prague Spring, in December 1968, ČSPS was divided into its Czech and Slovak parts due to federalization and Kotásek was elected the chairman of the Czech Pedagogical Society. He emphasized educational policy, international cooperation and contacts with teachers in his program presentation.

The second notable field of Kotásek's scientific activity in the second half of the 1960s is connected with inter-disciplinary cooperation with other social sciences. At that time, an inter-disciplinary team at the Institute of Philosophy of the Czechoslovak Academy of Science was being formed under the influence of Western 'futurological' social science studies and Soviet 'prognostic studies'. This team was led by Radovan Richta. Their aim was to study social and human aspects of the scientific revolution. The central topic of the international conference held in April 1968, and of the resulting publication *Civilization at the Crossroads (Civilizace na rozcestí; Richta et al., 1969)* was a humanistic concept of civilization. It emphasized the role of education in social and personal development. The identification of determining elements of social change presented a concept different to the previous dogmatic view of class struggle and social revolution. It corresponded to social theories in the world at that time and it was a significant stimulus for educational science. As part of an inter-disciplinary team, Jiří Kotásek put across his concept of lifelong learning together with other Czech educationalists. He started from a critical analysis of the educational system of that time and he argued for education at secondary level to be widely accessible, for individualization of pupils' learning and for teaching that emphasized learning processes for people in all life

situations. He also developed the concept of using technical devices in lessons. His study anticipated later theories concerning a knowledge-based society. While the English translation of his work received a vast amount of publicity, the results of this study were negatively criticized in the domestic environment in the time of normalization, and its further use was suppressed on grounds of alleged ideological unsuitability because it inclined to the theory of 'convergence', did not reflect a class division of the world and did not take the advantages of socialism as compared to capitalism into account.

In the tense post-Prague-Spring atmosphere, Jiří Kotásek published his critical views of the entrance of the Warsaw Pact armies into Czechoslovakia and defended the independence of scientific research. As a result of his opinions, international activities and publications, he was included on the central register of politically unreliable persons during the normalization period. He was forbidden to teach, to publish or to be otherwise publicly active. He was also forbidden to travel to the West. The nomination procedure for his professorship was suspended. Jiří Kotásek faced withdrawal from the life of the educational community and from the possibility of influencing future teachers in their educational activities. After the first wave of ideological and practical repression, he could take part in the work of teams concerned with information systems for education and educational science, teacher training programmes and methodological issues in the educational sciences and in subject-related teaching methodologies, mainly thanks to the support of the vice-rector of Charles University, Professor Kraemer. He was, however, not allowed to publish. Some of his studies and critical viewpoints were published as anonymous samizdat copies or under the names of different authors, particularly at the Institute for School Information (*Ústav školských informací*) and at the Research Institute for Vocational Education (*Výzkumný ústav odborného školství*). Although disqualification from scientific life when reaching the peak of his professional career was a deep disappointment for Jiří Kotásek, he continued working even in conditions under which a weak personality would most probably have resigned.

In the 1980s, when the strict normalization rules were loosened, Jiří Kotásek was accepted as a scientific assistant at the Institute for the Development of Higher Education Institutions (*Ústav rozvoje vysokých škol*). This newly established institution allowed him to concentrate on conceptual scientific work. He focused on the pedagogy of higher education institutions, studies of higher education systems and the methodology of their research. He published (now already under his own name) expert studies and study texts. He planned and organized pedagogy courses for teachers starting at higher education institutions, and he contributed to proposals for a multi-level university education and qualifications. However, he was still not allowed to travel to the West. However, due to an administrative mistake he went to the University of Surrey in Great Britain and participated in a course for teachers of staff development. Subsequently he was invited to partake in the creation of a conception for the training of university teachers. This gave him a certain satisfaction and the chance to apply his knowledge of theories on, and research into, higher education which he used in the programme document.

Until 1989, he was the head of ÚVRVŠ. This institution organized a number of national and international conferences and in all those activities Jiří Kotásek was its central personality. In 1985 he was even sent to Cuba to participate in the program of lectures focusing on improvements in the quality of higher education. Thanks to his activities and consistency, a network of higher education workplaces was created in Czechoslovakia which provided for the pedagogical and psychological training of teachers in higher education institutions. At the end of the 1980s, Jiří Kotásek initiated and developed cooperation with Slovak partners at institutions of higher education and with the Institute for the Development of Higher Education Institutions in Bratislava. A draft proposal for multi-level higher education, to which Jiří Kotásek significantly contributed, was submitted to the rectors of universities at the end of the 1980s. It was not accepted with understanding at that time. It was, however, ahead of its time and the further development of higher education institutions later on confirmed its progressive aspects.

After November 1989, Jiří Kotásek was rehabilitated. He was appointed a professor and he returned to Charles University. In January 1990, he was elected Dean of the Faculty of Education of Charles University by the academics. He understood this function as an obligation to the Faculty which he considered to be the main institution for university teacher training and which required fundamental reconstruction after the normalization period. In that period, the Faculty had compromised itself ideologically, educationally and scientifically. In the new approach of the Faculty, he looked back to the ideas of pre-communist 1946, but at the same time he strove for the creation of a modern university of a European type. In the first stage of his activity as the dean (apart from solving personnel and organizational problems) he restored the Faculty's educational and scientific activity with the help of a management team. It was to Kotásek's credit that after the abolition of the Comenius Institute for the Education of the Czech Academy of Science (ČSAV), conditions were created for establishing a new research workplace at the Faculty. Moreover, the editor's office of the magazine *Pedagogika* was also transferred to the Faculty. Thanks to his support, the Institute for Research in Education and Psychology (*Ústav pedagogických a psychologických výzkumů; ÚPPV*) was formed. At this institute, he gathered specialists from his former academic workplace and from other institutions. Similarly, experts and educationalists who contributed to the realization of the new way forward were accepted to work in other posts at the Faculty under Kotásek's service as Dean. Jiří Kotásek as Dean also strove for the development of the Institute for Further Education of Pedagogical Staff as a recognised university workplace. Further development, including a number of reorganizations, confirmed the value of Kotásek's approach. Currently, there are the following: the Institute for Research and Development in Education at the Faculty of Education of Charles University, which serves as a scientific and research workplace significantly contributing to Ph.D. study programs in education, the Institute for Professional Development of Pedagogical Staff, the Centre of School Management and the Centre for Educational Policies. The foundations of this structure were formed at the time when Kotásek was Dean.

In the 1990s, the transformation of the Czech educational system and educational policy stood at the centre of Kotásek's interest. He saw these issues in a complex way with their mutual relationships, in the context of international development and European integration processes which had to be linked to domestic conditions. In the first stage of transformation, he built a team of experts at the Faculty which defined the conceptual basis for one of the first projects of educational reform *The Future of Education and Training in a Restored Democratic Society and in the context of the European Unification Process* (1991, *Budoucnost vzdělávání a výchovy v obnovené demokratické společnosti a ve sjednocující se Evropě*). Kotásek considered international cooperation and the comparative study of education abroad to be an essential and natural component part of the development of education and educational science. He initiated the foundation of the department for comparative educational science at ÚPPV and the inclusion of comparative educational science in the study programs for teacher training where he himself taught. He can be credited with the fact that the 8th international congress for comparative education was held in Prague in 1992. The Faculty of Education of Charles University was its main organizer. The place where it was held and the main congress topic, *Education, Democracy and Development*, were fundamental in the given context. The congress contributed to the renewal of communication with educationalists across the world, and it gave moral and intellectual support to the transformation of education in the post-socialist countries in Central and Eastern Europe. Jiří Kotásek gave a lecture called *The Vision of Development in the Post-Socialist Era* at the congress based on the situation in Czechoslovakia. He concentrated on the transformation process of education in the context of fundamental changes in social, political and economic structures. He identified the ensuing dilemmas and outlined visions of the development of education after the breakdown of the former regime. He described the new situation as a laboratory for social and educational reform and he emphasized the importance of comparative education for the transformation process. After the congress, he became a Vice-President of the World Council for associations concerned with comparative education.

In the first half of the 1990s, despite being fully occupied with obligations as a dean and involved in public activities in favor of educational reform and in international activities, he published a number of expert studies and articles in specialist Czech and foreign periodicals which dealt with university education, teacher training and general issues of the transformation of educational systems at the end of the century. He participated in the creation of a specialist study entitled *Higher Education* (1991, *Vysoké školství*) which was taken as the basis for evaluation of Czech higher education by OECD examiners; he led the project *European Perspectives of Czech Education* (1994-1996, *Evropská perspektiva českého školství*); he took part in the project of the Council of Europe focusing on educational reforms (1995) and in the preparation of a significant OECD document *Reports on National Policy in Education: The Czech Republic* (1996, *Zprávy o národní politice ve vzdělávání: Česká republika*).

He resumed work in the field of educational policy after having served two

terms as the dean and after a research stay at Stanford University in the USA where he was awarded a Fulbright Scholarship. He became a scientific worker at the Centre for Educational Policy, and he represented the Czech Republic in a number of international organizations. His activities as a member of Czech UNESCO Commission and delegate from the Czech Republic to the Centre for Educational Research and Innovation of the OECD (CERI) or delegate of the Czech Republic to the European Network for Teacher Training Policy at the European Commission were of particular significance. He initiated the translation of the noted Delors report *Learning: the Treasure Within* (UNESCO, 1995) into Czech and wrote an introduction. He considered this report a world charter of education for the 21st century. He recognized a global foundation of educational policy in it which he defended and whose principles he applied in national documents in the following years, to the creation of which he significantly participated.

In 1996 Jiří Kotásek accepted the post of a consultant to the Minister of Education in which he worked for the next few years. In this function, he made use of his high expertise as well as strategy planning and diplomatic negotiations and a sense of the practical application of the theoretical basis of educational policy, to the construction of which he contributed significantly. In 1999 he was entrusted with leading the team that worked on the fundamental document of Czech educational policy *The National Program of the Development of Education in the Czech Republic* (*Národní program rozvoje vzdělávání v České republice*). Later he described this task as one of the most difficult as well as interesting that he'd had to deal with in his life and he devoted an essential part of his expert capacity to it. He considered the methodological basis of the White Paper as a specific kind of scientific knowledge and the process of its creation as a demanding collective work for which the dialogue between the expert and teachers was essential. The background for the White Paper's formation and for the demanding procedures connected with its preparation was provided by the *Institute for Research and Development of Education at the Faculty of Education of Charles University*, whose employee he was from 1998 until the end of his life. The formation of the White Paper became part of the research and development studies of the Institute; the expert viewpoints of its staff and the staff of the Faculty influenced this document. Jiří Kotásek untiringly moved the work forward; he initiated seminars and discussions. While being fully devoted to and involved in the project, he relied on cooperation and incited the enthusiasm of the whole team. The process of preparation of this document was described in the annual report of the Ministry of Education, Youth and Sports of the Czech Republic for 2000.

When the document was accepted by the government of the Czech Republic in 2001, Jiří Kotásek turned to the broader educational public. At a meeting of the Czech Society for Education in 2002, he presented a paper in which he explained the methodology and the meaning of the document from the expert point of view. He received positive feedback, which pleased him very much, and he considered the acceptance of the document by the general public as a source of the utmost satisfaction as an evaluation of the results of experts' work. As a consultant to the

Minister, he defended the White Paper's overall conception, its principles and strategic lines in the following years. Particularly during the formation of the draft School Act, he did not merely want formal document to be formed but it mattered to him that it was comprehensible, the meaning as well as goal of the changes codified, and that the needs of education in a democratic state were formulated. His proposal to include those ideas in the Preamble to the Act was not accepted because, according to lawyers' opinions, it did not respect the form and diction of Czech legislation. He was justly disappointed over this fact. But he intensified his efforts to interpret the meaning and goals of education in a number of lectures and articles published at home as well as abroad and he even presented his ideas publicly in the media.

From 1999-2004 Jiří Kotásek was co-author of the research project *Development of National Education and Teacher Training in a European Context (Rozvoj národní vzdělanosti a vzdělávání učitelů v evropském kontextu)*. The results of his research were published in several collections of articles and they were summarized in two chapters of the monograph *The Role of the School in the Development of Education (Úloha školy v rozvoji vzdělanosti)*. In those studies, Jiří Kotásek dealt with the transformation of the school and the basic outlines of educational policy as well as with the future of the school and education. In his last years, he focused particularly on issues relating to anticipating the future of education. He applied the methodology of future scenarios that was introduced to him during his participation in the OECD project CERI and he carried out remarkable research in the Czech environment. His results confirmed the recognition of the school as an irreplaceable social institution and organization concerned with learning processes. They also supported the future focus of our Institute which will concentrate on research into school education.

Jiří Kotásek was one of the initiators and co-authors of the project *Center for Basic Research into School Education (Centra základního výzkumu školního vzdělávání)*. He lived to see the decision that the project was accepted and received financial funds from the Ministry of Education of the Czech Republic. He welcomed the acceptance of the project with open delight and satisfaction. He was pleased about it not for himself but for education as such which, according to him, deserved to have an appropriate workplace and conditions for basic research.

In his last lecture which was held at the round table for educational policy *White Paper After Five Years* on February 23, 2006, he critically and with admirable profundity evaluated the development of school policy in the Czech Republic.

It is not possible to omit Kotásek's teaching activity and his close relationship to teacher training. He was categorically in favor of university Master's-level study for teachers at all stages of school development. He also pleaded for a balanced representation of expert, pedagogical and psychological, methodological and practical training in all study programs. He supported the formation of the Act on Pedagogical Staff and he succeeded in defending all the above-mentioned requirements. In his teaching activities, he was mostly concerned with tutoring Ph.D. students in his last years. He also taught comparative education courses

and courses on educational policy. He trained many Ph.D. students who currently have significant positions in higher education institutions, research institutions and in important national and international organizations. He influenced numbers of school directors and school authorities who attended his lectures on school management. He will be remembered by the teachers that he lectured with special pleasure and with whose training and profession he was concerned in a significant part of his research and publications. His lectures always had a clear and well-considered structure and were presented in precise language with scientific argumentation and with examples as well as personal experience which was appreciated both by students and his colleagues. As the chairman of habilitation committees, he supported the academic graduation of a new generation of specialists. As a member of scientific boards and Associations of Deans of Faculties of Education, he succeeded in putting through many progressive changes which supported the prestige of Faculties of Education.

Kotásek's work is characterised by a remarkable variety of topics, continuity and concentration on the essentials of the field. His comparisons between educational systems and analyses of educational reforms contributed fundamentally to comparative education and became the basis for further areas of educational science in which he was active. Comparisons and the feeling for real problems in the educational system brought him to the issues of educational policy and he played an essential role in the constitution of its scientific basis. As one of the first Czech educationalists, he elaborated the concept of lifelong learning and he applied it to teacher training. He founded the process of education for university teachers, and he contributed to the development of university teaching methodology and to a theory of higher education. He contributed to the development of a general teaching methodology perceived as a theory of teaching based on the interaction of instructors' teaching activity and pupils' learning activity with the broad background in the context of the way what effect external and internal factors have on the nature of this interaction. His argumentation in favor of methodologies of subject teaching contributed to the establishment of their scientific status. Last but not least, it is necessary to mention his contribution to the concept of professional teacher training and well-grounded insistence on the necessity of educating teachers at universities.

The internal continuity in Kotásek's work was deeply embedded in the traditions of Czech educational science and its connections to European values. This inner integrity of his work was a principal contribution to the restoration of Czech educational science and Czech education in the process of integration within Europe after 1989.

While having all those merits in his own specialist field, Jiří Kotásek was also a very precious and harmonious personality radiating energy and optimism which he was able to transfer to others, as he did his human honesty, reliability and sincerity. His joy at the success of others was entirely sincere, he liked to share his experience, he unselfishly shared materials and publications that he gained on his foreign travels, and he constantly had new inspiration. He was a scientist of great

erudition. He was very hard-working and he never limited his perspective to his own work. He preferred dialogue and team work, valued its internal coherence and gladly accepted various roles in the team. As a coordinator and partner or co-author, he always worked at a high level of professionalism and with high standards in terms of quality. At the same time, he was a gentleman and a great companion with an amazing sense of humor.

Unfortunately, Professor Jiří Kotásek is not with us any more. He died after a long and serious illness on August 22, 2006. His work's heritage is, however, not finished. It remains a bequest for his followers among whom we would like to consider ourselves and we would like to take up the baton honorably.

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REVIEWS

BRAY, M.; ADAMSON, B.; MASON, M. (EDS.)

Comparative Education Research. Approaches and Methods.

CERS Studies in Comparative Education 19. Hong Kong:
Springer, 2007, 444 pages. ISBN 962-8093-53-3.

The newest international publication issued as the 19th volume of the Comparative Education Research Centre, University of Hong Kong presents an essential contribution to the methodology of comparative research in education. The book is remarkable not only by its content and a broad thematic scope but also, and above all, by a deep insight in the methodological problems of comparative education based on analyses of ample amount of published comparative studies as well as on own experience from the research provided by the authors of contributions. A group of sixteen authors from 8 universities from 4 countries (Australia, China, Germany, United Kingdom), concerted under the editorial baton of leading specialists from the Comparative Education Research Centre at the University of Hong Kong, prepared a welcome boon to the field of comparative education and, more than this, to the world view on education research as such. The conception of the book emphasises the view that comparative education has a potential to deep understanding of the substance of educational phenomena in the context of human culture. Only readers expecting a manual on specific ways how to use particular research instruments could be disappointed.

The presentation of an overview research types is a necessary background plan of the book. The main aim is to evoke contextual consideration which should influence the choices of tools and research strategies. In our opinion, the major sense of the book lies in encouraging its readers to consider comparative education more carefully, its methodological rocks and dangers as well as the challenges, strengths and potentials of the rigorous comparative research in education.

The history of comparative education documents that the approaches and methods have been a major concern in the field. Particularly during last decades, the discussion has focused on changing educational realities and the ways of their reflection. The turn of millennium has brought new issues, tools and perspectives being discussed at various forums on the global, international or regional levels. The reviewed book is an attempt to re-evaluate the development of comparative education, its significant shifts, continuity and discontinuity in the field. It further attempts to give broader horizons to comparativists located within diverse academic groups and to outline a framework for comparative education research in the globally changing world.

The book is divided into three parts: Directions, Units of Comparisons and Conclusions.

The first part ***Directions*** focuses on different actors and purposes of comparative education. It discusses qualitative and quantitative approaches and the role of

experience in comparative education research. The knowing more about own education supported by learning more about education in other cultures and societies is emphasised as the main purpose of comparative education research. Advantages and disadvantages of quantitative, nomothetic, value-free research are compared with qualitative, idiographic, interpretative, value-added approaches. The appreciation of the complementarity of both approaches respecting various purposes and dimensions of comparison is documented by a particular comparative research on literacy. A broad definition of comparative education refers to a long lasting search for cultural complexity across and within the borders of different countries. Limits of the objectivity of comparative education research traditions and paradigms constituting concepts of comparison are under attention. The main critical point is found in the linearity of positivist approach which is very logical but unable to consider the complexity of education as a complicated phenomenon. An appropriate methodology for comparative education research is to be found within humanities rather than sciences. Ethnographical and phenomenographical methods or case studies related to cultures, values, human and social experiences are at least of similar importance as quantitative data for the re-fashioning comparative education research. The credo of this part of the book stresses the synthesis of qualitative and quantitative work illuminating the educational issues to be investigated.

The second part of the book deals with **Units of Comparison** in a rather detailed way. Comparative education analyses have traditionally focused on geographical entities. In this part, the book gives evidence on other units of analysis such as cultures, policies, curricula and different systems of education. First, the use of **place** as a unit of comparison is discussed. Variety of examples of single-level or multi-level analyses support the view that comparative studies of both types, interpretative or casual-analytic, should pay careful attention to *tertium comparationis* to provide reliable establishment for meaningful explanation and results. Similarities and differences of compared units should be examined in the context, in the networks of determinants and relationships in educational realities. The chapter convincingly demonstrates that comparing places provides an opportunity to examine educational phenomena at different levels and it opens discussion for exploring such units as schools, districts, provinces, countries or world regions.

Since the beginning of the 20th century, familiar comparative approaches have focused on **educational systems**. Mark Bray and Jian Kai, authors of the explanation, indicate the difficulties with defining the educational system despite the frequent use of the term and provide examples of national educational systems as well as educational systems operated by non-governmental bodies. They introduce a set of illustrations of different systems in one country and show that educational systems within different countries are not of the same type. They also state that relatively a few studies explored cross-national systems, e.g. international schools. Antony Sweeting introduces another unit of analysis, the **time**. Exploration of comparing times focuses particularly on important timelines and phases (e.g. educational reforms or transitional processes) in the context of social changes.

The **comparison of cultures** and cross-cultural comparative research probably seem as the most complicated. They focus on rituals, beliefs and ethos but consequently the greatest area of interest is dedicated to the educational equity. In this chapter, particular attention is paid to the **comparison of values**. A set of given examples documents the necessity and possibility to investigate values using quantitative as well as qualitative methods. The most controversial area of comparison in this chapter is introduced by Neville Posththwaite and Frederic Leung and concerns the **educational achievement**. It needs interdisciplinary collaboration and finding invariant items in educational systems, variant curricula as well as heterogeneous groups of pupils. The problems of comparison are also associated with variance among schools, regions and countries. The methodology of IEA study, which is properly explored, provides extremely rich opportunity to the analysis. We can only regret that the OECD-PISA methodology which is different was not taken into account in the reviewed book. The book also considers **educational policy** as a rather young area of comparative education research. The chapter by Yang Rui is an excellent explanation of the concept taking into account recent economic, demographic and ideological changes in national frameworks as substantial determinants of educational policy influenced by globalisation. The author explains reasons for increased attention to the changing role of state in education policy and post-nation state era and he demands to investigate factors operating on supranational or sub-national levels respecting diversified challenges of various cultural environments. In our opinion, finding of a broader globally valued interpretation of the curriculum concept which is complex, multi-faced and covering a broad range of manifestation is the virtue of the contribution on comparing **curricula** by Bob Adamson and Paul Morris.

The third, rather a modest part (pages 339 - 381) of the book with the title **Conclusions** consists of two chapters. The first chapter called *Scholarly Enquiry and the Field of Comparative Education* by Mark Bray argues that in spite of different organizational and institutional structures of the research, the field of comparative education is and must be interdisciplinary. Referring to other leading comparativists of recent decades, the author defends the central position of a special discipline, *educology*, among education-related disciplines. Educology could have a coordinating and synthesizing role providing feedback to other disciplines concerned with research on various aspects of education. Comparative education could play the role of comparative educology using the potential of *tertium comparationis*. Until today, comparative education has unfortunately been too eclectic in topics, approaches and methods. It is very difficult to find its specific academic identity. Paradigmatic differences in different times and different parts of the world which are documented by the co-existence of multiple comparative education present further difficulties. The author expresses challenges toward higher intellectual culture, advanced comparative inquiry and a strong rationale for the products of comparative research. The second chapter of this part called *Different Models, Different Emphases, Different Insights* is written by all three editors and is of synthetic nature. In this chapter, we find a rather progressive **step to re-**

conceptualisation of comparative education into comparative educology. The editors successfully provide a *comparison of comparison* in the context of a range of foci within a variety of paradigms. First of all, they reflect the co-existence of *many models* and *parallel units* for comparative study of education. Concerning places, they accept **three variations** for comparison: a) education in at least two countries; b) education within a single country with strong autonomy of different internal units; and c) multi-location study. Concerning the levels of comparison, the cross-national model is substituted by a more sophisticated *framework* respecting cultural, political, economical or ideological (religious) differences or similarities as well. *Intra-national comparison* should be important when different systems exist in one country (e.g. Flemish speaking vs. French speaking schools in Belgium). The attention should be given to *supranational alliances* (e.g. European Union) and to *education* that is conducted *in cyber space* (mainly over the internet). Concerning *times*, three dimensions, *past*, *present* and *future*, are to be in the focus of comparison. *Multileveled* and *multidimensional comparisons* are considered as important, particularly for a holistic comprehension of the essence of educational phenomena.

The editors state that due to evolution and remarkable global shifts in the field, the purposes, character and topics of comparative education research are very diversified. In spite of heterogeneity of paradigmatic frameworks and plurality of approaches, we can agree with them that there are commonalities in the field. Methodological cultivation contributes to a better understanding of educational systems and processes in different parts of the world. The development of comparative education documents growing similarities of the issues facing educationalists across the world in the era of a global mutation of human civilization. Education as a counterpart of the global change and the impact of education on knowledge-based society are to be investigated complexly and comparatively. A choice of methods and their application demand high professionalism and intellectual effort.

The reviewed book is a very advanced attempt to support or inspire further development of methodology of comparative education research in the world.

We recommend the book to a broad academic community, to students and other readers operating in the field of education and having ambitions to improve educational research.

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WALTEROVÁ, E.

Srovnávací pedagogika. Vývoj a proměny v globálním kontextu. (Development and Changes in a Global Context).

Praha: Univerzita Karlova – Pedagogická fakulta, 2006, 325 pages.

Eliška Walterova's book "Comparative Education: Development and Changes in a Global Context" - *Srovnávací pedagogika. Vývoj a proměny v globálním kontextu* - is for its mere extend a remarkable work. Most notably, however, it is a remarkable work for its scope and its endeavour to cover a whole discipline with due analytical profoundness.

As the title suggests, the author assigns to herself the very demanding task of giving an over-all view over the development, the present state, and the tendencies of a whole academic discipline. Though, in Comparative education itself now and then arise discussions if comparing educational facts in various education systems, countries and cultures is an independent academic discipline or if it is rather a certain methodology used in the general discipline of pedagogical research. E. Walterová rightly reminds us the fact that comparison is a basic procedure of every science and research. Though, there are specialized academic subjects applying the method of comparison not only as a methodology but also as independent academic disciplines. Seen on an international scale, there are universities which established separate chairs or departments of Comparative Education. Other universities do not have such separate units, and as far as foreign education systems are studied at all in those institutions, it is done rather unsystematically, sometimes randomly and often in accordance with personal preferences and incidental international contacts of individual faculty members.

The fact, however, if a formally acknowledged academic discipline develops out of the enthusiasm for scholarship and academic research of lone fighters, be it single persons or groups, or if it is constituted by a bureaucratic decree in some universities as a discipline and a subject for students to be included in their course of studies, is not really decisive for the destiny of a discipline: Research activities become an academic discipline by the constantly increasing flow of relevant scholarship which promotes the factual knowledge in a given field and which forms an autonomous system of theoretical and methodological understanding and thus guaranties a constantly evolutionary progress in the given field.

No doubt, in the field of Comparative Education it is the rather small number of works like the one Eliška Walterová has written which definitely boost the further flow of scholarship and progress and supports it as a discipline and its acknowledgement in the academic world.

It is one of the great advantages of the book, that the author not only informs us about the discipline and its discussions but offers us a broad and systematic choice of relevant and characteristic contributions, often in form of quotations, of important educational comparativists on their view of the state of the discipline. In the same proven way of accurate and systematic manner as in the other parts of

the work, and with plenty references to the important thinkers of the discipline, the author proceeds in the field of definitions, terminology, and the description of the historical development of comparative education.

In Czech universities comparative education as an academic discipline and as a subject of comprehensive and systematic interest in world education – apart from extensive contacts among educationalists from the Socialist countries - was for long treated as a minor matter. Within a very short time following the change of regime in 1989/90 this changed definitely and we witness quite a number of recent books and articles on aspects of concrete comparison and on the methodology of educational comparison. Eliška Walterova's book outreaches many of these works by putting comparative education in a systematic way as well into the historical context of its development in the Czech context and worldwide as also into the broader context of today's dominant influence of globalization of society.

The historical overview is presented on the basis of diligent studies, and the author does not content herself with merely pointing at the start of this discipline (already at the begin of the 19th century) but outlines to a certain degree of detail the inner logic and the contextual connectivity of the emergence and the evolution of the discipline including a convincing periodization of this evolution.

It is no doubt especially deserving that the author in the chapters on the single world regions informs about not only the present state of the discipline but also about its history in regions and states which normally in European scientific papers often are dealt with only sketchily or which are totally ignored. Closer attention certainly deserves for the Czech reader the systematizing overview over the domestic comparative education.

The parts on history and present stage of the discipline are augmented with a characterization of the role of international and trans- and supranational organizations and agencies that have become mayor co-players also in the field of education. To a degree they exert very concrete influence over educational policies in the different countries. The tools of exerting this influence are partly direct ones (common, coordinated decisions of delegates of the member states of these organizations, financing certain projected and approved reforms in single countries etc.), sometimes they are indirect ones (for example through the influence of worldwide large scale assessments like IEA and PISA, expert reports on school systems like those done by the OECD, the spread of private assessment and test services, and others). Not least it is comparative education which systematizes such influences and transfer models, spreads their knowledge over the globe, and thus contributes to a certain worldwide homogenization of education. On the other hand the author rightly and with a deep understanding points out, that next to the homogenizing tendencies of today's globalizing development the significance and the meaning of tradition and cultural influences does not loose ground at all and will not so in the future - in the contrary, they might gain importance. The author points in a clear and convincing manner to the fact that comparative education finds itself positioned in a constellation of multifaceted, sometimes even conflicting interests and trends of convergence as well as divergence: On the one hand there

is the endeavours to broaden the knowledge on examples of “best practice” from which all school systems can learn and possibly even find a common way to attain the improvement of schooling and schools, and on the other hand it is wishful to broaden the knowledge of and the respect for various and culturally diverse ways. In this context the author also directs attention to the interdisciplinary character of comparative education. The term inter- or multidisciplinary is not seldom used as an empty formula. However, comparative education - and this E. Walterova’s work exemplifies nicely - cannot get away with not being in its very self-conception and with all seriousness an inter- and a multidisciplinary venture.

The author offers a work which brings to the fore convincingly and competently the not always unambiguous connectivity of a highly complex discipline in its historical flow and in its actual state. The book addresses in the first place educational comparativists and the pedagogical community as a whole, but it too will serve well all those who as specialists of other disciplines in their genuine work are theoretically or practically confronted with questions of education such as sociologists, economists, politicians, administrators and others. The book can be recommended also to a more general public, that is all those who take interest in questions of education and schooling in an international perspective. Last but not least the book can be recommended strongly as an important and valuable and well readable study material for every student of pedagogy.

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REPORTS

CHANGING GEOGRAPHIES: INNOVATIVE CURRICULA

One of the most significant events in educational development in the area of geography in 2007 is considered to be the conference on innovation in geography education called *Changing Geographies – Innovative Curricula*, which took place at the University of London in the Institute of Education from 10th – 12th April 2007. The conference was held under the auspices of two international organisations dealing with education in geography – International Geographical Union Commission for Geographical Education (IGU-CGE) and HERODOT (Network for Geography in Higher Education) associating institutions focusing on teaching geography at tertiary level. The conference was attended by 55 representatives of universities and other research and educational institutions from 23 countries. The main goal of the conference was to initiate discussion about innovation in the geography curriculum.

The conference opened with a plenary speech in which the Chair of the International Geographical Union Commission for Geographical Education L. Chalmers (University Waikato, New Zealand) introduced the viewpoint of the International Geographical Union on innovation in teaching geography. Among other matters he underlined the need for monitoring the rapid development in information and communication technologies and for implementation of appropriate elements into geography education (Geographical Information Systems¹, GPS², e-learning etc.). L. Chalmers also considered the historical development of the school curriculum which he traced back to the first half of 19th century when individual states began to control autonomously the form of school education (before that it had been mainly the Church who had authority in this matter). He noted that nowadays the curriculum is partly a political matter. At the end of his presentation he paid attention to ongoing curricular reform in New Zealand. Several thoughts of L. Chalmers, especially those concerning information and communication technologies, were developed by S. Bednarz (University A & M, Texas) in her speech on teachers' pedagogical development. She drew attention to the commonly insufficient knowledge of teachers in this field and in this context the phrase 'pedagogical content knowledge' was introduced (cf. Mishra, Koehler 2006³). The term comprises not only teachers' content knowledge and pedagogical knowledge but also takes into consideration teacher's competencies

- 1 Geographical Information System organised a system of hardware, software and geographical information developed to process and present spatial data.
- 2 GPS (Global Positioning System) is a satellite system used to specify the position, speed and time of an object in any place on Earth. Currently used primarily as a navigation system in transportation etc.
- 3 MISHRA, P.; KOEHLER, M. J. Technological Pedagogical Content Knowledge: A New Framework for Teacher Knowledge [online]. Michigan State University [quot. 2007-04-26]. Available at: <http://punya.educ.msu.edu/publications/inpress/journal_articles/MishraKoehler_TPCK.pdf>

in the information and communication technologies that should be employed in teaching. The guest of honour H. Haubrich (the emeritus chair of the International Geographical Union Commission for Geographical Education) presented his contribution on geographical education curriculum innovation.

The conference participants were divided into eleven paper sessions whose titles corresponded with the main current issues in teaching geography. Most of the presentations were given in the section on innovation in the curriculum (The Challenge of Geography Curriculum Development). Above all the position of geography in school teaching in different countries was discussed (Candel, T. R. Planinc etc.), some talks dealt with experience with teaching geography in a foreign language (A. Zaparucha) and G. Butt presented a study on problems of assessment of geography education.

In the section devoted to the current changes in the curriculum several interesting papers were presented. M. Robertson presented research which proves the effectiveness of e-learning courses in geography teaching, especially e-learning in a home environment. P. Knecht presented the results of research focused on pupils' difficulties in understanding geographical concepts mentioned in geography textbooks. J. S. Medina clarified the complex problem of the position of geography in the Spanish curriculum caused by its integration with history.

Another section was working on geography education at primary level (Children Constructing Place). M. Roberts introduced among other things the results of an analysis of the representation of Southern Italy in English primary school geography textbooks. The results indicate that even the authors of contemporary textbooks perpetuate the stereotypical image of Southern Italy as one of the most backward places in Europe and outdated information for presenting the topic is used. L. Taylor in her speech dealt with representations of Japan among nine-year-old English pupils.

In the section which concentrated on spatial thinking in geography education (Spatial Thinking) I. Jo demonstrated the results of an analysis of questions and exercises from four current textbooks of Geography in the USA in relationship to their role in the development of 'spatial thinking' in pupils. She remarked that 30% of the analysed questions and tasks had no link to spatial thinking and most of the other questions enhanced only the simplest level of spatial thinking in pupils as they are primarily associated with locating geographical objects on a map.

Very inspiring papers were presented in the section on fieldwork (Developments in Fieldwork Practice), which plays a prominent role in geography teaching. S. Hegarty considered the problem of constantly increasing numbers of university students in Ireland who are supposed to undertake fieldwork but in such numbers that such work is not feasible. To tackle the problem she put forward a model combining fieldwork and e-learning which she tested on a sample of 200 students. O. I. Steen presented the results of an investigation showing that university students achieved more when they were involved in fieldwork.

In the section focusing chiefly on problems of terminology in geography (Conceptualising the World) J. Vávra introduced a study on the different

understanding of the concept of 'place' in the geography curriculum in various countries, including the Czech Republic.

The section dealing with interdisciplinarity in geography education (Contested Geographies) drew attention to the position of geography between science and humanities. This position facilitates cooperation with other scientific disciplines or school subjects within the educational process. The issues of environmental (S. Catling) and multicultural education (J. Halocha) in geography teaching were the main ones discussed. The principle of sustainable development in the context of geography teaching was dealt with in a special section (Geographical Education and Sustainable Development). Its significance was emphasised also by, among others, Y. Schleicher and T. Paljor. H. Haubrich spoke about the concept of innovative geography education that aims to promote sustainable consumption, sustainable tourism, intercultural understanding and awareness of the local and global impact of every individual's behaviour.

A substantial number of papers in the sections devoted to Geographical Information Systems (GIS) in geographical education (GIS in School Geography and GIS in Higher Education Geography) confirmed that the development of the contemporary methodology of geography corresponds with the development of geography as a scientific discipline in which Geographical Information systems currently represent one of the main branches. However, P. Falk noted that according to the results of his research the incidence of teaching geographical information systems at primary and lower secondary level is very rare and often dwells on theory. Therefore, T. Johansson stressed the need for further teacher training in this area.

In the written presentation session there were also papers about innovation in Geographical Information Systems related to education at higher secondary level (Geography in Higher Education). The issue of the waning interest of students in some countries in the study of geography was also addressed. A. M. Ezpeleta, M. P. Otón and X. Santos confirmed this fact using the example of Spain. In the discussion which followed it emerged that in most East European countries, they have to cope with the problem of maintaining high quality with growing number of students – the opposite of the situation in Spain.

In the last section on experiential geography (Experiencing Geographies) speakers presented topics that may sound rather unusual. O. Mentz considered the influence of poetry on geography and geography on poetry. He sees geography as one of the ways in which to understand different tendencies of development in European literature in past and present. H. Kim introduced the results of research on the relationship between a place and the specific smell connected with this place in children's memories.

The conference Changing Geographies-Innovative Curricula presented a unique opportunity for comparing geography education in individual countries and at the same time it indicated how geography education will probably develop in the near future. Individual educational systems in different countries are at the moment varied to such an extent that a global curriculum of geography education, which

was also discussed at the conference, seems to be a utopian ideal. Nevertheless, certain trends are apparent on a global level.

Note: Conference proceedings, abstracts and electronic presentations of the papers are available on the website of the conference. <http://www.herodot.net/conferences/london2007>

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