

LEARNING COMMUNITIES AND SOCIAL TRANSFORMATION

RESEARCH FINDINGS IN EASTERN AND CENTRAL EUROPE

CLOSING REPORT OF THE RESEARCH PROJECT



LEARNING COMMUNITIES AND SOCIAL TRANSFORMATION: RESEARCH FINDINGS IN EASTERN AND CENTRAL EUROPE

Closing report of the research project



Nullpont Cultural Association

2019

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ISBN 978-615-00-7286-9

Learning Communities and Social Transformation: Research Findings in Eastern and Central Europe

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FOREWORD

The role of general learning and different skills (basic skills, key skills, management skills, citizenship skills, etc.) has intensified. Without having these skills professional knowledge is difficult to capitalise. The development of such knowledge and skills and their acquisition is possible via adult training for some social strata. Among other things, this is the reason why adult training (of both the vocational and general kind) has recently been granted an enhanced role in Hungary and the whole of Europe, with respect to both economics and social welfare. The relationship between vocational and general training, supplementing and benefitting from one another, is obvious.

Professional literature and examples in Hungary and abroad both prove that adult learning is not merely a concern of the economy. The importance of general trainings is highlighted because of their social role, too. The role of general training in social mobility is significant: it makes it possible for citizens to freely exercise their right to knowledge; it lays the foundations for and supplements vocational and labour market trainings as well as trainings in the workplace; it may contribute to the social integration of the most disadvantaged strata (young and adult dropouts, people with low educational qualifications, immigrants). A productive adult training programme can have a positive impact on not only indices on well-being and employment but also on health care.

In 2010 the European Union approved a medium-term economic programme that is based on knowledge, a high level of employment and an environmentally friendly economy. According to the professionals, the implementation of the program may be facilitated by a more active involvement of women and younger and older employees, a better integration of immigrants in the labour market, as well as a higher rate of employment and learning among people with lower educational qualifications.

The goal of this research was to examine adult learners in the partner countries, to learn about their motivation to participate in trainings, their interest and the possible hindrances. In addition, we strove to map the areas of knowledge where adult learners are more active and find learning more effective as well as the methods of learning, which we analysed from several angles: on the one hand, whether they prioritised general, vocational or language trainings; on the other hand, the choices between formal, non-formal, cultural or community learning. We also intended to examine the institutions and sources of learning as well as the factors influencing the willingness to learn.

The closing report is divided into two greater units. The first part includes studies on the participating countries' educational, adult educational and training networks. The second part describes the findings from the processed questionnaire used in the research.

The individual units have been created by different authors; therefore, for the sake of clarity, the referenced bibliography is listed after each study similarly to the numbering of figures and tables.

The editor

**STUDIES ON THE EDUCATIONAL AND ADULT EDUCATIONAL
NETWORKS OF THE COUNTRIES PARTICIPATING IN THE
RESEARCH**

Formal and non-formal adult learning in Hungary

Formal learning

Formal education is performed in different types of educational institutions and at different levels. Public education traditionally provides primary qualifications (primary school, vocational school) and secondary qualifications through a final or maturity examination (vocational secondary school, grammar school); tertiary or higher education, granting a degree, is performed at universities and colleges. (The first level of public education, nursery school, is not discussed in this study.) The number of public educational institutions corresponds to a country's prevailing social and economic status and is heavily influenced by demographics (that is, the number of babies born). Table 1 shows the number of different types of institutions in a regional breakdown, while Table 2 lists the number of students in public education.¹ The numbers of schools and students are permanently prominent in Central Hungary, Northern Hungary and the Northern Great Plain Region in all school types, which is due to the rate of births, which higher in the latter two cases than the national average, and to intraregional migration induced by more favourable economic indices (resulting in population growth) in the former.

¹ We have used the newest data available on the KSH website in our analyses, which in this case are from 2014.

Table 1: Number of premises of public education institutions, 2000-2016.

Type of school	Region	2000	2005	2010	2014	2016
Primary school	Central Hungary	740	704	690	768	773
	Central Transdanubian Region	448	422	391	417	419
	Western Transdanubian Region	489	448	391	404	393
	Southern Transdanubian Region	473	424	377	400	389
	Northern Hungary	645	591	526	566	561
	Northern Great Plain Region	587	554	518	594	587
	Southern Great Plain Region	493	471	413	472	470
Vocational school	Central Hungary	132	143	150	158	152
	Central Transdanubian Region	78	86	104	99	91
	Western Transdanubian Region	67	73	81	72	77
	Southern Transdanubian Region	65	75	88	89	81
	Northern Hungary	63	82	104	114	124
	Northern Great Plain Region	96	117	155	191	132
	Southern Great Plain Region	84	97	120	115	112
Grammar school	Central Hungary	206	249	253	267	264
	Central Transdanubian Region	66	84	87	95	95
	Western Transdanubian Region	54	63	66	63	62
	Southern Transdanubian Region	55	65	83	68	66
	Northern Hungary	61	71	97	92	102
	Northern Great Plain Region	94	130	171	183	202
	Southern Great Plain Region	79	99	119	114	103

Type of school	Region	2000	2005	2010	2014	2016
Vocational secondary school	Central Hungary	221	262	248	247	216
	Central Transdanubian Region	101	96	112	112	88
	Western Transdanubian Region	94	97	97	88	76
	Southern Transdanubian Region	82	95	78	77	65
	Northern Hungary	98	104	109	108	103
	Northern Great Plain Region	116	152	157	176	158
	Southern Great Plain Region	118	125	138	133	116

Source: Based on data from the Central Statistics Office, edited by the authors

Table 2: Number of students in public education in a regional breakdown, 2014, persons

Type of institution	Region	2000	2010
Primary school	Central Hungary	232 365	202 479
	Central Transdanubian Region	109 920	80 794
	Western Transdanubian Region	90 945	69 840
	Southern Transdanubian Region	94 340	70 422
	Northern Hungary	130 740	102 752
	Northern Great Plain Region	168 090	132 569
	Southern Great Plain Region	131 450	97 713
Vocational school	Central Hungary	24 700	24 853
	Central Transdanubian Region	15 940	18 422
	Western Transdanubian Region	13 455	14 781
	Southern Transdanubian Region	14 005	16 246
	Northern Hungary	16 585	18 492
	Northern Great Plain Region	22 415	25 601
	Southern Great Plain Region	18 430	20 842
Grammar school	Central Hungary	59 930	67 402
	Central Transdanubian Region	16 830	19 445
	Western Transdanubian Region	16 400	17 823
	Southern Transdanubian Region	49 870	18 294
	Northern Hungary	19 390	21 031
	Northern Great Plain Region	26 290	30 274
	Southern Great Plain Region	23 020	24 431

Type of institution	Region	2000	2010
Vocational secondary school	Central Hungary	67 870	66 171
	Central Transdanubian Region	26 555	26 389
	Western Transdanubian Region	25 755	26 411
	Southern Transdanubian Region	20 755	18 990
	Northern Hungary	31 955	31 803
	Northern Great Plain Region	34 055	37 118
	Southern Great Plain Region	32 355	33 482
Total		239 300	240 364

Source: Based on data from the Central Statistics Office, edited by the authors

In Table 3 we compared two data sets. The first shows the regional distribution of the number of students in a breakdown by training venue, the second the number of students in higher education as per their permanent residence. The number of higher education institutions is highest in the Central Hungarian Region due to the several universities and colleges found in the capital. The great appeal of the capital is clear here, as there are three times as many students here as the number of Budapest-based students (of course, not all Budapesters attend a metropolitan institution, but the rate of metropolitan youth studying out of town is presumably lower). The two regions of the Great Hungarian Plain are important hubs of rural higher education. With regard to student population Baranya County is prominent of the Transdanubian counties. Traditional great rural universities and their catchment areas constitute the hubs of Hungary's higher education; their student base is characteristically informed by the regional districts. The higher educational regions thus created do not necessarily correspond to the divisions by design and statistical regions: for instance, students of the University of Debrecen come from Hajdú-Bihar, Szabolcs-Szatmár-Bereg and Borsod-Abaúj-Zemplén counties as well as from across borders (primarily from Transylvania and the Subcarpathian region).

This is the reason why in Hajdú-Bihar, for example, there is a significant difference between student numbers as per training venue and as per permanent residence, where the former outnumbers the latter. At the same time there are twice as many local residents of Borsod-Abaúj-Zemplén County who have enrolled in some institution as the number of university students in the county. The same may be observed in Csongrád and Baranya counties, where the drain effect of Szeged- and Pécs-based universities is felt. The situation is the opposite in all the counties of the Northern Hungarian region, from where young students migrate to the capital or the higher education institutions of Hajdú-Bihar. In Central and Western Transdanubia there are higher local student numbers in comparison to the training centres' headcounts. In all probability most of the local residents continue their studies in Budapest, as in the aforementioned regions there are no counties with a prominent student headcount (similarly to Baranya in Southern Transdanubia).

Table 3: Number of students in higher education bachelor's and master's courses in a breakdown by training venue and the students' permanent residence, in persons, 2014, 2016

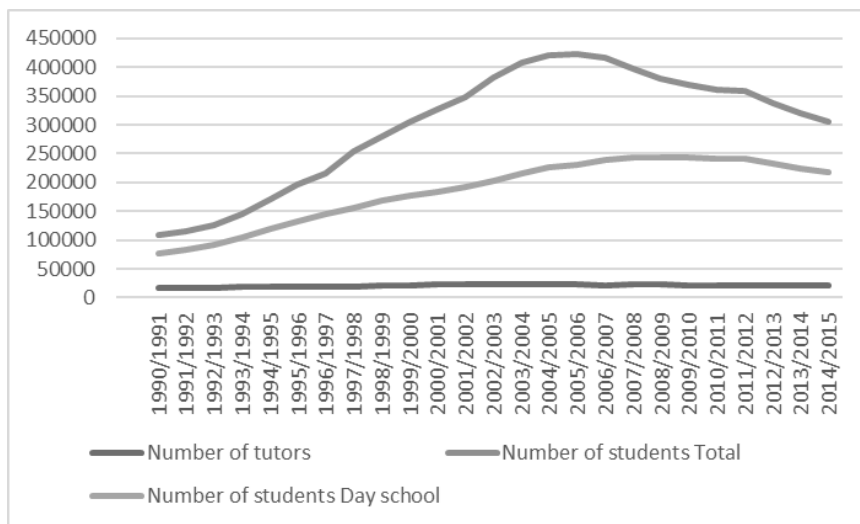
	Student numbers as per training venue, 2014	Student numbers as per training venue, 2016	Student numbers as per permanent residence, 2014	Student numbers as per permanent residence, 2016
Budapest	107 514	104321	35 297	32051
Pest	5 674	4318	22 946	22297
Central Hungary	113 188	108639	58 243	54348
Fejér	1 799	1215	7 290	6350
Komárom-Esztergom	402	243	5 007	4447
Veszprém	3 549	2916	6 232	5536
Central Transdanubian Region	5 750	4374	18 529	16333

	Student numbers as per training venue, 2014	Student numbers as per training venue, 2016	Student numbers as per permanent residence, 2014	Student numbers as per permanent residence, 2016
Győr-Moson-Sopron	10 403	9064	7 960	7275
Vas	1 532	1317	4 725	4291
Zala	1 731	1553	5 470	4903
Western Transdanubian Region	13 666	11934	18 155	16469
Baranya	13 293	12989	6 628	6114
Somogy	1 704	1714	4 883	4387
Tolna	369	293	3 741	3392
Southern Transdanubian Region	15 366	14996	15 252	13893
Borsod-Abaúj-Zemplén	6 726	5955	11 974	10544
Heves	3 371	2873	5 768	5163
Nógrád	–	-	3 020	2681
Northern Hungary	10 097	8828	20 762	18388
Hajdú-Bihar	21 002	19304	11 465	10348
Jász-Nagykun-Szolnok	628	370	6 331	5474
Szabolcs-Szatmár-Bereg	2 903	2234	10 840	9933
Northern Great Plain	24 533	21908	28 636	25755
Bács-Kiskun	2 385	2049	9 452	8330
Békés	647	392	6 160	5350
Csongrád	17 387	16382	8 115	7463
Southern Great Plain	20 419	18823	23 727	21143

Source: Based on data from the Central Statistics Office, edited by the authors

With regard to the nationwide trends of student numbers in higher education we may establish that the expansion that blossomed in the 1990s significantly inflated the student headcount in all school types (Fig. 1). After the halt experienced in the mid-2000s the increase of student numbers in day school (full-time students) continued moderately, whereas it lapsed significantly in correspondence courses (night school and distant education always appealed to a low number of students in Hungarian higher education in the years under survey). In the meantime staff headcounts remained relatively unchanged.

Figure 1: Number of students in higher education: day school and part-time students, as well as staff numbers between 1990 and 2015, persons



Source: Based on data from the Central Statistics Office, edited by the authors

Adult education related to different levels of education primarily performs gap-filling and correctional functions. The chances of occupation and further education (e.g. vocational qualification) of people with low educational qualifications or without any qualifications are both enhanced by making up for missed learning in primary or secondary school. The number of adults attending primary school is rather low, which is due to the improving educational indices of the population; on the other hand, the proportion of people who haven't finished even their fourth year is still relatively high. The expansion in secondary education (in the 1970s and 1980s) had an impact on adults taking their school-leaving ("matura") examination, too. Following the saturation, however, the number of such learners gradually waned, while the generations attracted to day school by the expansion of secondary education grew up to be adults. This generation became involved in the massification of higher education, too, since the expansion wave reached the day courses in higher education in the early 1990s.

The number of students in part-time (night and correspondence) courses of higher education also increased after that, and people with an intention of graduating as adults flooded the universities and colleges. The institutions reacted sensitively to adults' demand for higher education, increasing their choice of courses. The studies of these people, arriving via the "backstairs" (*Ladányi* 1994) of higher education, are judged differently from those of day-school students (e.g. they follow a very different path to learning, there is no possibility to immerse themselves in the material learnt and to consult their tutors in style, there are different requirements), but after the heterogenisation of day school the differences appeared to fade away. Higher education's methodology (e.g. the lack of practical orientation) and organisation of studies (e.g. the lack of validation of prior knowledge and skills) do not treat part-time students differently, most of whom have labour market experience (*Maróti* 2002, *Derényi and Tót* 2011). Little attention is paid to the learning difficulties and demands of students who characteristically study while having a job and/or a family (*Tózsér* 2013, *Engler* 2014).

Defining which students belong in adult education may be carried out on the basis on different criteria: biological and psychological maturity, economic activity, an own living, having a family. The legal approach standardises the decision: the law draws the line at a certain age. Legal adulthood does not always correspond to the legal school-leaving age. The school-leaving age was modified several times after the change of regime (from 16 to 18 in 1996, then back to 16 in 2012). The debates on school-leaving age view the problem of school years basically from different standpoints: according to advocates of legal adulthood (18 years of age) attending school postpones the time of making important decisions about one's career and job, leaving ample time for personal development and the maturation of interests and skills. The reason for keeping young people in the educational system is providing a foundation for life-long learning, but another significant reason is the prevention of unemployment. Advocates of a school-leaving age of 16 (or 14) wish to provide the social stratum that amasses learning failures, truancy and dropping out with early work experience and an own living, not excluding the possibility of further education (c.f. *Fazekas et al. 2008, Halász 2010, Mártonfi 2011, Fehérvári et al. 2011*).

In Hungary adults' institutional learning primarily appears at tertiary level. The data in Table 4 make it obvious that the higher the educational level, the higher the proportion of adult learners in the courses. Based on the time-series data from the Central Statistics Office and the educational annals it can be established that as a result of an improvement in the populace's educational level the number of adults enrolled in primary public education institutions is definitely dwindling. At secondary level the night schools of grammar schools providing a matura exam are popular with former dropouts. Although the changes in higher education (expansion, the Bolognai process) had an impact on the enrolment tendencies among adult learners, the correspondence course arrangements supplied by colleges and universities are still the most appealing for people wishing to learn.

Table 4: The number and proportion of full-time and part-time students at educational institutions in the academic year 2014/2015

Number of students	Primary school	Vocational school	Vocational sec. school	Grammar school	Higher ed.
Total number of students, in persons	751 034	109 978	221 144	216 368	306 524
Part-time students, in persons	2 548	9 946	32 382	34 140	89 276
Percentage of part-time students of total number of students	0.3	9.0	14.6	15.8	29.1

Source: Based on data from the Central Statistics Office, calculated and edited by the authors

Non-formal adult learning

The term ‘non-formal learning’ is used in a broad sense in the study, as we discuss its elements of general learning as well as vocational training, with special emphasis on the institutions and students of adult education outside the public educational system. Beyond reviewing the number, areal distribution and defining training characteristics of the institutions, approaching from the participants’ side, we analyse the proportion of adults in the trainings and the areal and regional characteristics of such participation. Koltai (2005) and Farkas et al. (2011) carried out surveys on the non-formal field, but by another method, focussing specifically on accredited institutions and programmes, through questionnaires.

With regard to adult education in Hungary we have access to several different records, in addition to the records of institutions and adult education trainings that have passed the certification processes, we have available data from the adult education statistical data of OSAP 1665 as well as data collected from the data supply of community cultural and public collection institutions. In our work we use the OSAP 1665 database.

We have chosen this because we may find data on learners (or rather participants, when discussing adult education outside the school system) in a regional breakdown by type of training.

OSAP 1665 adult education statistics holds data² on trainings outside the public education system.³ It must be mentioned that the OSAP database is often criticised for being incomprehensive, because several organisations do not comply with their data supply obligation. Yet, looking at the number of data supplying organisations and institutions in the past years, there is no extraordinary deviation.

The following table (Table 5) delineates the number of institutions providing trainings between 2011 and 2017 in regional breakdown. By 2015 there is a substantial decrease, which in our opinion is due not to failure to meet the data supply obligation, as the number of institutions between 2011 and 2013 was relatively permanent, but due to a restructuring following the adult education act of 2013. Beyond the decrease in the number of organisations the regional proportions did not shift: the number of organisations is higher in Central Hungary as well as the Northern and Southern Great Plains and Western Transdanubia. This is probably due to another reason: the Northern and Southern Great Plains have a favourable situation when it comes to distribution of funds owing to their disadvantaged status. Also, in Central Hungary and Western Transdanubia there is a presumably greater and more solvent demand for adult trainings, either financed by individuals or by workplaces. Yet, it also clearly shows that by 2017 the number of organisations is on the rise again.

²The data refer to the following characteristics of the trainings: type, number of hours, time, form, job code that the qualification qualifies for (FEOR code), the lowest school qualification required for the training, venues of theoretical and practical training, the participation fee, the parties funding the training fee of the enrolled, the institution organising the examination, the number of participants enrolled in the training listed in the OKJ (National Training Register), the labour market status of the participants, groups of the participants (age group, educational qualifications).

³ As per Act No. LXXVII of 2013 on adult education and Govt. Decree No. 288/2009 (XII. 15.) on the data collections and data takeover of the National Statistical Data Collection Programme, the obligation to notify burdens the institution providing the training, and the time of notification is the 10th day from completing the exam/training, and in the case of official trainings or those with a duration shorter than 25 hours, the 10th day after the year of the training.

Table 5: The number of organisations providing trainings by regions, 2011-2017.

Regions	2011	2012	2013	2014	2015	2016	2017
Central Hungary	803	811	819	690	637	620	648
Central Transdanubia	115	113	135	105	99	100	108
Western Transdanubia	146	139	145	114	111	113	110
Southern Transdanubia	106	105	97	88	89	91	104
Northern Hungary	144	123	123	109	91	93	108
Northern Great Plain	196	204	198	190	169	156	190
Southern Great Plain	176	158	174	133	114	124	138
Total	1686	1654	1691	1429	1310	1298	1407

Source: OSAP 1665 <https://statisztika.mer.gov.hu/>

Examining the institutions providing trainings for their types (Table 6), we may establish that between 2011 and 2017 the proportion of institutions that provide vocational training (providing OKJ vocational qualification approved by the state or vocational further training) is bigger, but the number of language courses and generic adult education trainings is not insignificant either.

Table 6: The number of institutions providing training by type of training, 2011–2017.

Type of training	2011	2012	2013	2014	2015	2016	2017
Vocational basic training preparing for later vocational qualification	33	22	27	18	15	20	21
Providing OKJ vocational qualification approved by the state	445	459	456	375	326	433	467
Providing non-OKJ vocational qualification not needed for a job or occupation	110	117	105	76	77	74	72
Vocational further training	339	306	313	235	232	179	189
Integrational training of disadvantaged people	7	9	4	6	6	9	9
Training facilitating occupation or enterprising	38	30	27	26	27	19	21
Official training for a qualification by an authority (in the traffic, communications or water management sector)	65	74	68	63	63	59	52
Certified auditor training	0	0	1	0	0		
Language courses	276	287	294		201	198	170
Generic adult education	280	271	308	287	299	254	279
Rehabilitational training of people disadvantaged workers	1	2	1	2	8	1	0
IT trainings	93	75	87	73	52	46	122
Trainings preparing participants for input competencies	0	4	1	4	5	5	5
Total	1686	1654	1691	1429	1310	1298	1407

Source: OSAP 1665 <https://statisztika.mer.gov.hu/>

Table 7 shows the number of people that completed adult education trainings outside the school system between 2011 and 2016, in a county breakdown. We may establish that besides Budapest and Borsod-Abaúj-Zemplén County, Hajdú-Bihar, Szabolcs-Szatmár-Bereg and Győr-Moson-Sopron counties have the highest number. These data partly correspond to the data on institution numbers, as the number of institutions is higher in Central Hungary, the Northern Great Plain and Western Transdanubia.

**Table 7: The number of people that completed their trainings
in a breakdown by counties (2011-2016)**

Venue of the training (county)	2011	2012	2013	2014	2015	2016
Baranya	22858	21870	26950	30280	24939	14111
Borsod-Abaúj-Zemplén	32019	27955	39941	63309	56055	22719
Budapest	289378	250199	234614	255160	264530	271151
Bács-Kiskun	27491	24312	31882	36771	25279	22719
Békés	14681	12630	18063	19683	15369	8308
Csongrád	22345	18013	26410	34114	27023	18493
Fejér	21515	17858	29189	29046	28475	19646
Győr-Moson-Sopron	34163	40560	53055	45632	41109	36157
Hajdú-Bihar	28719	24718	40068	64663	42814	26255
Heves	13288	13445	17795	24382	19355	12794
Jász-Nagykun-Szolnok	16166	14601	22961	30114	18922	11042
Komárom-Esztergom	14846	11201	15178	14823	14684	12012
N/A	0	0	0	1176	335	0
Nógrád	7081	7377	10442	11292	9412	3500
Pest	39722	29203	36503	33373	32306	28847
Somogy	15297	11806	18770	19032	15700	10712
Szabolcs-Szatmár-Bereg	22207	22679	38317	49245	36977	23784
Tolna	8042	8868	14688	12491	11465	8628
Vas	15454	17326	22125	21583	16557	14992
Veszprém	13954	11298	17950	21309	20312	13064
Zala	13348	13039	15890	17169	16007	8939
Total	672574	598958	730791	834647	737625	593114

Source: OSAP 1665 <https://statiztika.mer.gov.hu/>

Taking the number of people that completed their trainings in a breakdown by the type of training (Table 8), it is obvious that the number of vocational trainings⁴ is approximately the same, and in the case of some trainings (integrational training of disadvantaged people; trainings to facilitate occupation or enterprising; language courses, generic adult education, IT trainings) the number is above average, which is due to the singular projects financed from EU funds. The increase in the number of participants in language and IT courses is probably due to the programme called ‘Your knowledge is your future’, whereas the number of participants in the generic trainings might have been influenced by the trainings for public sector employees.

⁴ Trainings of the vocational type: providing OKJ vocational qualification approved by the state, providing non-OKJ vocational qualification not needed for a job or occupation and vocational further training

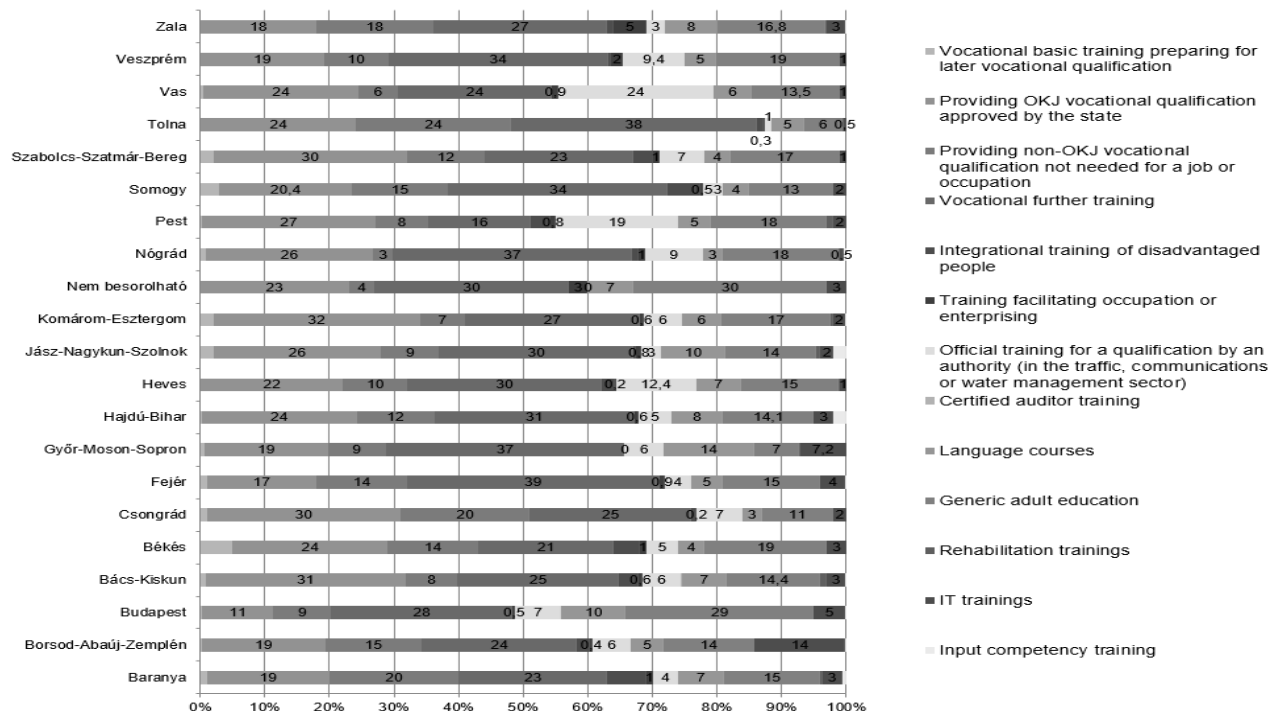
Table 8: The number of people that completed their trainings, by type of training (2011-2016)

Type of training	2011	2012	2013	2014	2015	2016
Vocational basic training preparing for later vocational qualification	6995	3442	4654	7142	4123	3801
Providing OKJ vocational qualification approved by the state	107644	110908	148197	140436	139185	130169
Providing non-OKJ vocational qualification not needed for a job or occupation	50062	52860	55855	80362	83600	51480
Vocational further training	234627	224260	205978	236198	207474	140398
Integrational training of disadvantaged people	1494	2810	4853	35797	7822	1501
Training facilitating occupation or enterprising	6692	5829	8558	16268	5419	2736
Official training for a qualification by an authority (in the traffic, communications or water management sector)	45197	48956	49961	47452	53923	72098
Certified auditor training	0	0	286	406	453	432
Language courses	82805	62421	121319	93177	55036	47178
Generic adult education	72988	60687	84161	117740	144805	111327
Rehabilitational training of people disadvantaged workers	391	432	803	2598	859	55
IT trainings	63626	25930	45622	55812	33118	23510
Trainings preparing participants for input competencies	53	423	544	1259	1808	8429
Total	672574	598958	730791	834647	737625	593114

Source: OSAP 1665 <https://statisztika.mer.gov.hu/>

Examining the number of people that completed their trainings in 2015 in a breakdown by counties and types of training (Fig. 2), we may see that trainings providing OKJ vocational qualification approved by the state, vocational further trainings and generic adult education trainings have the highest numbers of participants. Vocational trainings (including the following: providing OKJ vocational qualification approved by the state, providing non-OKJ vocational qualification not needed for a job or occupation and vocational further training) are more significant.

In the case of vocational trainings there is a difference in the distribution of trainings among the types, whether the number of participants is higher in the ones providing OKJ vocational qualification approved by the state, the ones providing non-OKJ vocational qualification not needed for a job or occupation, or the vocational further trainings.

Figure 2: The number of people that completed their trainings by county and type of training, 2015(Source: OSAP 1665 <https://statistika.mer.gov.hu/>)

The changing numbers are probably not due primarily to an increase or decrease in the willingness to learn, but to the shifts in supply and financial funds. These together influence the sector. The differences between regions and counties may correspond to changing funds (EU subsidies) as well as the various demands in the given regions and counties.

Regarding the fact that here we do not see a vertical structure – as opposed to trainings in the educational system –, the total number of participants well defines the system, that is, it has indicator value (Györgyi 2015).

Summary

With respect to the numbers of institutions of formal and non-formal learning and the corresponding regions we may establish that in both forms of learning the number of institutions is highest in the regions of Central Hungary and the Northern Great Plain. Beyond this, in the formal tier, higher numbers are observable in Northern Hungary, and in the non-formal tier, in the Western Transdanubian and Southern Great Plain regions. This is due partly to favourable or unfavourable economic situations, and partly to demographics.

Reviewing the data, there is no functional correlation between participation in formal and non-formal adult education, in regions with a lower level of formal learning the number of participants in non-formal learning is not higher. Low or high participant numbers in both tiers is characteristic of the given region. On the basis of available data we were not able to discern any function of non-formal adult education which would compensate for or supplement formal education.

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Adult learning in Romania

Historical background

Directly before 1989 the concepts 'adult education' and 'adult training' appeared in Romania as an interpretation of the term 'mass culture', subjected to the ruling political ideology, in service thereof, hardly a scene of learning.

Examining the previous period, however, Sava (2007) asserts that different epochs may be distinguished in Romanian adult education.

The first, initial phase came to its own in the 19th century, when several new initiatives were launched with the purpose of educating and sophisticating the people. The primary goal of these was to raise the people through learning. In Romania one of the most significant in this period was 'Școala Ardeleană', whose illustrious representatives authored textbooks and books addressed to the people with the intent to enlighten them. At this time several organisations were born, which launched cultural movements (e.g. ASTRA), published periodicals and established libraries. Different church organisations had a substantial role to play, too. The Law on Education of 1864 already supported the learning activity of adults, and the *Societatea pentru învățătura poporului român* was set up, which was determined to promote the learning of the masses. With respect to the Hungarian minority, the Transylvanian Hungarian Community Cultural Association (EMKE) was prominent in encouraging adult learning, with the following goals: to reinforce the Hungarian language and national identity, especially in isolated communities of Transylvanian Hungarians; to establish cultural institutions, also mainly in isolated communities: nursery schools, adult education centres, libraries, choirs, etc. and literacy courses, spreading the Hungarian language; as well as to promote the economic elevation of Hungarian communities (Sándor 2009). In this period schools became training and cultural centres for adults, too, since primarily in rural areas they provided the only way to cultural learning.

At the same time both in the towns and the country cultural clubs and conferences were organised as an opportunity for adult learning.

The second phase lasted from the early 20th century to the Second World War. While in the first phase, the education of adults was realised through presentations held at different venues as well as the aforementioned conferences and was consequently fragmented and contingent, in the second phase it became more regular and institutionalised. A prominent personality in this period in Romania is Dimitrie Gusti, who strove to ensure cultural advancement by taking field trips to Romanian villages with his colleagues, learning about their reality, disclosing cultural and learning demands and needs, preparing the 'village's pedagogy' and trying to 'raise the villagers to their own era' (Sava 2007, 71). At the same time several adult education centres were established in the period: Universitatea Populară de la Vălenii de Munte, Școala Superioară Țărănească de la Poiana Câmpina, etc. The most productive stage in this second phase of Romanian adult education was the interwar period, in which the emphasis was on the cultural demands of disadvantaged villagers and on providing opportunities to satisfy those needs.

The third phase lasted from the Second World War to 1989. Without denying advancements in this period directed at the annihilation of illiteracy and raising interest in culture, in summary we may establish that all initiatives bear the trace of party ideology. Owing to that, neither cultural activities (realised with the intent to ensure equal access to cultural values, but with a character lauding the Party, which mostly aroused opposition from the people), nor the characteristics of adult education (which made participation in further trainings every five years obligatory, and where a significant part of the 'teaching material' was listing realisations by the Party and setting further goals) promoted the full establishment of adult educational system. Flóra, Györbíró and Szilágyi (2012) also emphasise that the real roots of Romanian adult education go back to the period between the two world wars, when 'people's universities' and 'peasants' colleges' were established in many towns of the country, which set as their main goal the cultural improvement and community learning of the agricultural people of villages.

In the period of communist rule this kind of activity was greatly extended and filled with ideological content appropriate to the regime; besides villagers, city-dwellers and industrial workers were regarded as a target group.

After 1989, according to Pepelea (2011), adult education initiatives started rather slowly. First they attempted to reorganise former models, the purpose of which was primarily to train adults in generic trainings and enlarge professional knowledge. The initiatives to set up institutions based on western models, including development workshops for trainers' trainers, could be regarded as more efficient.

Simona Sava (2005) divides the period after 1989 into three further parts, which well exemplify the developmental stages of Romanian adult education:

a. In the first three years after the demise of the socialist-communist regime there was a strong decline of interest in adult education, as the developmental endeavours were focused more on ensuring economic balance and coherent politics. As a result, since education in general and adult education in particular was not allotted enough attention and funds, over half of the adult education institutions (operating under the supervision of the Ministry of Culture) terminated their operation in this period.

b. The period of continuous rebuilding and a search for a development strategy lasted from 1993 to 1997. The difficulties of the transitional economic situation manifested themselves in adult education, too. A possibility to create a diversified choice of trainings appeared, and the field was decentralised, but no financial funds could be allocated for the opportunities. Despite all that the progress was evident. On 23 February 1993 the National Association of Adult Education Centres (*Asociația Națională a Universităților Populare*) was set up, which unified over 100 of the 360 adult education centres then existing in Romania (*Pepelea* 2011). The establishment of the association is significant also because it became a member of the European Association of Adult Education, and thus several international cooperative projects were realised. These projects revived the domestic adult education system, too. In the same period, a number of new professions as well as unemployment appeared (unknown

in the socialist-communist regime), and realising that the Ministry of Labour and Social Protection started to spend massive amounts on the vocational training of the unemployed and on programmes designed to rehabilitate disadvantaged people. At that time several new institutions conducting permanent retraining were created (in 1996 there were 14 regional centres countrywide, operated by the Ministry, which were mainly designated to train and retrain the unemployed). Numerous state-owned and private institutions were created in the period, and these tried to adjust their training choice to adults' training demands mostly in the form of further trainings.

c. According to Sava (2007), the third phase after the changes is the period after 1997. The phase itself presents a step forward for several reasons: firstly, because the National Association of Adult Education Centres increasingly encouraged the creation of an adult education law (which was passed in 2000); secondly, the awareness-raising effect of international conferences was observable in the professionals; and thirdly, the National Ministry of Education's (Ministerul Educației Naționale) interest in adult education was increased. As a result, key institutions were created (Romanian Council of Adult Vocational Training <CNFPA>, Council of Occupational Standards <COSA>, etc.), which played a significant role in developing and effectuating the adult education law and also actively contributed to the professionalization of adult education. At the same time, the National Ministry of Education encouraged the development of university further training programmes, for which appropriate funds were created, too. Owing to these the universities established their choice of distant education and correspondence courses.

Another measure of the Ministry was to validate the certificates granted by different adult education institutions. In 2000 a government decree (OG 129/2000) was passed, which regulated the vocational training of adults. Even though there was a lack of synchronisation between theory and practice due to the conceptual chaos, the attention paid to the field was ahead of its time, and the change was marked by a transformation of such institutions and a much broader practice (adult education conferences – Temesvár 2001, 2006; Jászvásár – 2002, 2005, 2006, etc.; the Romanian Institute of Adult Education is established <Institutul Român de Educare a Adulților>).

In the second half of the period, on the threshold of Romania's EU accession, also to meet the requirements of the Community, a whole range of supplementary regulations were released, attention became much more regular and ever greater amounts are now being spent on adult education (even though the sums do not cover the demands sector). In summary we can state that the practice of adult education is being continually optimised owing to the accumulation of theoretical research and practical experience.

Statutory background

János Márton (2005a) divides the laws on adult education and training in Romania after the change of regime into three periods:

- 1990–1994: vocational training for adults, as a form of training for the unemployed;
- 1995–2001: the appearance of adult education and training as well as the concept of life-long learning, in parallel to the vocational training of the unemployed;
- 2002–2004: a change in the vocational training of the unemployed and a practical application of adult education laws;
- This is supplemented with a new period, from 2004 to today – in which adult training is organised in terms of the laws and methodology created in the previous periods, but there is an unfortunately low efficiency of attracting the target group (lowest in the European Union – Comisia Europeană, 2016)

The characteristic traits of the individual periods are listed as per the aforementioned study (see Márton 2005a, 122-24)

a). The period between 1990–1994:

In this period adult education as such was not mentioned in any of the laws. The training of adults was primarily a social problem, part of the policy to mitigate unemployment. The two laws from this period are: Act 1991/1 on unemployment and Govt. Decree No. 1991/288 on the training and retraining of unemployed people. In these laws vocational training appeared as a tool of reducing unemployment *by training and retraining unemployed people*. In addition, there were other provisions for non-

unemployed people taking part in payment-bound training and retraining courses. The training activity was carried out primarily in training/retraining centres set up in labour and social directorates created by the Ministry of Labour and Social Protection. The other laws approved in this period were mainly passed to amend and supplement the two laws. Besides the concepts of *training* and *retraining* the term *further training* appeared (in the text of Act No. 1994/57). These came under the umbrella term '*vocational training*'.

b). The period between 1995–2001:

This was the most productive period with respect to laws on the vocational training of adults, adult education and life-long learning in Romania. Even though this was not a time when the greatest number of statutes were passed, the most important regulations on basic terminology and most significant institutions appeared. New institutions were created to realise and harmonise training activity, the terminology of adult education was defined and there was an attempt to modify the adult education system as per European norms.

This period could be further divided into two subperiods:

- **1995–1997:** new institutions joined the ones created in the previous period, and new terminology was introduced to develop implementation protocol for training activity.
- **1998–2001:** greater achievements, entirely new institutions and terminology were used more and more in accordance with the European prescriptions, and the basic legal framework was created.

A significant change was when in addition to the Ministry of Labour and Social Protection the Ministry of Education, too, was allotted an increasingly significant role in adult training, and the Ministry of Culture appeared among the actors. This was when the breakthrough took place: the training was not only a priority for the unemployed, but involved the whole of the population. It was not only the institutions subordinated to the labour and social protection directorates that could participate in training activity but educational institutions, too. At the same time other institutions which providing training as a service joined in: companies, NGOs and state-owned institutions such as art education centres, adult education centres, cultural centres, cultural homes, libraries, museums, youth and

trade union houses and clubs. In this sense the activity was closer to the cultural learning of adults.

As mentioned before, different institutions were established with the responsibility of organising, coordinating and operating adult education activity. First the National Agency of Occupation and Vocational Training (ANOFP) was set up (Act No. 1998/145), which supervised the vocational training of the unemployed; then the National Council of Adult Vocational Training (CNFPA) (Act No. 1999/132), which coordinated adult and vocational training nationwide, and the Council of Occupational Standards (COSA) (Govt. Decree No. 1999/779), the task of which was to develop, based on occupational standards, the validation framework of professional competencies. Later the ANOFP was reorganised, with a new name: National Workforce Occupational Agency (ANOFM) (special Govt. Decree No. 2000/294), while COSA was terminated and its duties transferred to CNFPA (Act No. 2003/253). Committees performing the certification procedure of vocational training service providers (Govt. Decree No. 2000/129) and the vocational training centres subordinated to ANOFM (Govt. Decree No. 2001/1318) were set up.

In terminology the following arc of development is traced: in addition to 'vocational training', used previously, there appear the concepts of 'life-long learning' (educație permanentă) and 'adult education/training' (educația adulților) (Act No. 1995/84 on education). The concept of 'permanent vocational training' (formare profesională continuă) is created (Govt. Decree No. 1998/102), then this is overwritten by the concept of 'life-long learning', too (Act No. 2000/133). Life-long learning and adult education were defined as national priorities in Minister's Decree No. 2000/3062.

Another great and much awaited development in national adult education was the appearance of the first framework regulation with Govt. Decree No. 2000/129, which defined the legal framework on adult vocational training, from the concept of adult and defining adult training goals to the task of organisation to the requirements for training institutions and tutors to the regulation of assessment and financing. In this document different training types were distinguished: initial practical training (inițiere), training, retraining, further training and specialisation.

Of the three periods this was the most productive with the most innovations introduced. However, implementing the new elements in the laws had to

wait. Probably most of these laws were passed as part of the reform process, to conform to the requirements of EU integration, with few practical points. This is evidently reflected in the fact that there are several government decrees and special decrees among the regulations, which were submitted to parliament for approval late or not at all, as well as the fact that none of the laws resulting in groundbreaking and substantial changes to the problem under survey here received prescriptions for implementation in time.

c). The period between 2001–2004:

This was the period when a rather small number of novelties appeared in the topic. One novelty was that besides formal forms of education the regulatory system of non-formal and informal education was created (Act No. 2002/375). One of the most significant measures was the total transformation of the legal framework regulating the status of unemployed people by Act No. 2002/76. With this – and Govt. Decree No. 2002/174 and 2002/377 – the determining laws passed in the first period were repealed and a new regulatory framework was created in the matter. Thus the symbiosis of unemployment training and adult training of the previous years was mostly terminated, both found their place and role in the system, together with their specific institutions.

In comparison with the previous period, a significant change was the amendment of almost all previously approved laws on adult education/training and the development of their prescriptions for implementation. Thus, the regulations, which had existed as formal laws, started to manifest themselves in practice, too. By early 2004 a more or less transparent system of adult training/education had been created (Márton 2005a).

d). The fourth period, **from 2004 to today**, is based on the same legal framework that we have seen earlier on. This was reviewed and amended in 2014, when the supplementing government decrees of the past 10 years were integrated. This means that today adult education institutions operate according to these, which are amended by Govt. Decree No. 522/2003 and its supplementary decrees (Govt. Decrees Nos. 887/2004; 1829/2004; 918/2013; 481/2015), and which include the norms for implementation, too.

As adult education activity in Romania today is organised as per the law on national education (Legea Educației Naționale, 1/2011) and the previously mentioned law, hereafter we present the structure of these (based on the version of the national educational law updated in 2018, and the 2014 reworked version of OG 129/2003).

Article V of the **law on national education** regulates the problem of life-long learning and specifies that this can be realised in formal, non-formal and informal contexts, and it defines the schemes and institutions alongside the given types of learning activity. The state provides access to education and continuous vocational training for all those that have not completed their studies at the obligatory levels; dropouts from the school system without any vocational qualification; people who have finished their studies but in professions irrelevant for the labour market; adults who have returned to the country after being employed abroad; people with social and economic disadvantages; people over 40, with low qualifications; people threatened by failure in school, and all those that wish to take part in a permanent educational programme. From the list it may become evident that the regulation intends to provide a solution to a severe social and economic problem. In Romania one of the fundamental and defining phenomena is the permanent employment of the adult population abroad. The support of adult education for those returning can have a motivating effect on people who might find employment in the country.

An important regulatory action of the national educational law was the setting up of National Authority of Vocational Qualifications (ANC), which provides framework conditions for adult educational institutions when creating their range of courses to offer. The appearance of a national framework of vocational qualifications also makes it possible for knowledge obtained in formal, non-formal and informal spaces alike to be validated. The responsibility of local authorities – in partnerships with different training service providers – is to ensure the possibility of life-long learning. These can be individual training institutions or those cooperating with municipalities such as cultural centres, vocational training service providers, social partners, NGOs, who adjust their training choice to local demands. It is evident that the national educational law only provides a

general framework for adult education. The details are left to the government decree on the vocational training of adults (129/2000).

The law on adult training takes its point of departure from the basic idea that the vocational training of adults is an integral part of the national system of education and vocational training and is a general interest. This itself grants adult education its appropriate rank in Romania. Prominent goals for the vocational training of adults include:

- Promoting the social integration of individuals, in harmony with the labour market demands and personal vocational schemes
- Updating professional knowledge and further training in the original vocation or in kindred sectors
- Modifying the vocational qualifications as per economic restructuring, social mobility and unemployment trends
- Obtaining modern knowledge on the given job to more fully serve in the given professional capacity
- Promoting and disseminating the idea of life-long learning

The realisation of life-long learning contributes to reach the following specific goals, too: ensuring appropriate workforce for challenges in the workplace; retraining of employees to meet changing requirements in the workplace; preventing negative social impacts of reorganisation processes; increasing the professional mobility of workers, creating new workplaces.

A fundamentally important element in the law is the provision of sufficient and good quality, for which the act provides prescriptions on supervisory bodies, dividing them into different administrative levels. These bodies are appointed by the ministries responsible for adult training (Ministry of Labour and Social Justice, Ministry of National Education).

The forms of realisation of adults' vocational training are as follows:

- Trainings organised by vocational training service providers
- Trainings in the workplace as per employers' demands
- Vocational practice and specialisation in the country and abroad
- Other forms of vocational training

The vocational trainings offered have to observe the Romanian Training Register (COR), but there could be trainings that undertake to simultaneously develop several competencies needed in different professions, key competencies or 'transversal' competencies (bridging several fields) (COR was transformed in 2016 and is known as the National Framework of Qualifications <CNC>).

The government decree, further, provides for the problem of certifying and reviewing vocational training service providers as well as the requirements for assessing output competencies (the series of theoretical and / or practical trials in which the participant attests their obtaining the specific competencies), the details of funding the training (by the employer, the unemployment fund, from grants and sponsorship, as well as external sources or by the participant). The final provisions specify, among other things, that adult education service providers enjoy exemption from the obligation to pay VAT.

The government decree specifies the adult education of minorities in two sections. On the one hand, if participants request in writing, they can take part in the training organised in a minority language, with attention to the free choice of every applicant wishing to take part in a given programme. On the other hand, the adult education service providers that organise their training in the language of the minorities are obliged to prepare the training programme in Romanian, too. With respect to the minorities the language of the training is a key point in attracting participants. Attila Papp Z. (2005) asserts that as long as the language of trainings in the school system is continually subject to political battles, a market logic is fully realised in the burgeoning adult education system: this is true for Hungarian organisations, too, which organise Romanian trainings if needed, as well as Romanian ones that show appropriate tolerance towards participants with linguistic barriers when using the Romanian language.

The institutional network

Romanian adult education is realised in a diverse network of institutions, which is multifarious with respect to the institutions' size, structure and function. When accounting for these, we make a basic distinction between vocational training for adults and generic education for adults.

a.) The obligation to create the network of **adult vocational training** falls upon the Ministry of National Education as well as the Ministry of Labour and Social Protection. It can be organised with the purpose to teach a vocation (initial training), that is, to provide a basic qualification, and to provide some vocational qualification, specialisation and further training alike.

The network of institutions of adult vocational training is systemised in accordance with the forms of realisation:

The coordination of primary vocational training is supervised by the Ministry of National Education and includes vocational training in the school system: vocational schools, vocational grammar schools, post-secondary training. In the ministry there are several institutions with duties referring to this sector of adult vocational education such as the National Centre for Vocational Training and Development; the National Council of Further Training; the county education inspectorates, vocational schools, vocational secondary schools, technical grammar schools; the houses of teachers present in all counties, which are responsible for the professional further training of teachers; higher educational institutions, which take part mainly in providing primary vocational qualifications, even though there are centres of professional development, too.

Organising and coordinating vocational further training is essentially performed the aforementioned Ministry of Labour and Social Protection, since they deal with developing the training programmes and the legal background on vocational training and occupation, supervising the implementation activity of the National Workforce Occupational Agency, developing the organisational framework of individual vocational courses (in cooperation with the Ministry of National Education) and issuing the certificates accepted in the labour market. Subordinate to this ministry the following institutions serve the cause of continuous vocational training:

the National Workforce Occupational Agency (ANOFM); regional and county-based Workforce Occupational Agencies (AJOFM); the National Council of Adult Vocational Training (CNFPA), which belongs in the scopes of both ministries and includes the Council of Occupational Standards, too (COSA).

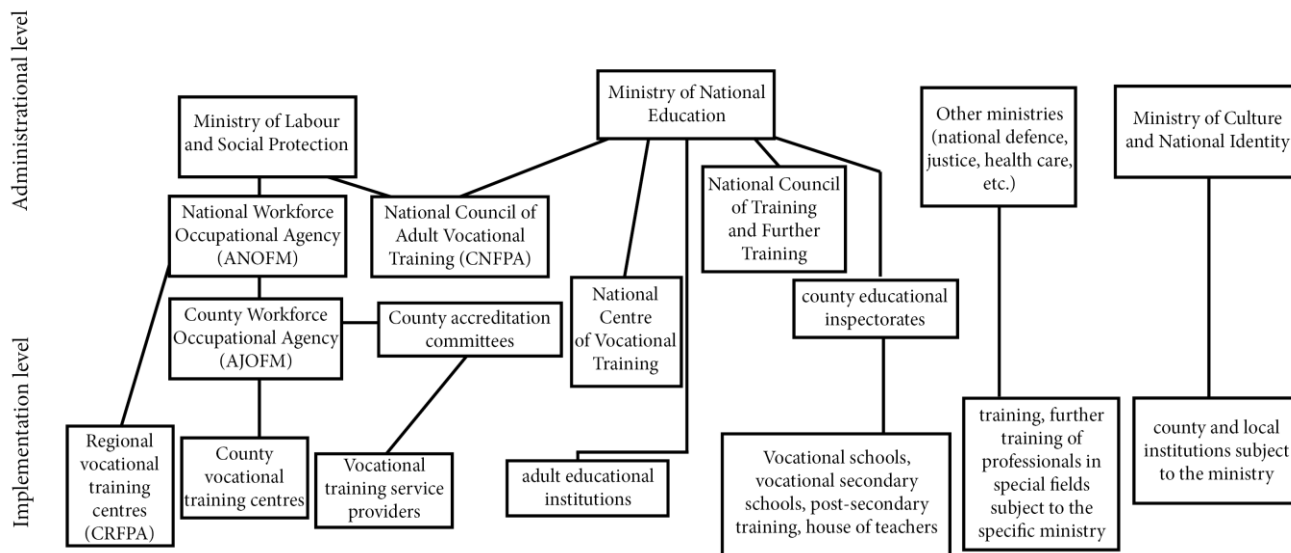
At the same time, other ministries can take part in vocational education, ensuring a supply of professionals for fields of specific activity as well as the continuous development of professional competencies (e.g. national defence, justice, health care, etc.).

There are two great groups of adult training service providers:

- Service providers in the public sector: adult education courses by institutions in the educational system, training centres subject to ANOFM, training centres connected to certain vocational areas.
- Service providers in the private sector: different trainings provided by NGOs, associations, foundations, trade unions, etc.

b.) The **network of adult cultural education** serves the purposes of generic education and development, primarily coordinated by the Ministry of Culture and National Identity, and recommends the certification of cultural institutions, organises further training programmes in partnership with domestic and foreign organisations, promotes and assists accredited public institutions in carrying out their further training duties, cooperates with the appropriate bodies in the further training of cultural professionals. The network of institutions includes primarily cultural facilities, such as cultural homes; cultural centres; adult education centres; schools of folk art and trades; local and regional heritage centres; county and municipal libraries; theatres, museums, galleries, which have an unquestionable role in developing and supplying cultural learning to adults. Their choice of training courses covers the entire field of adult education, even though it primarily involves generic culture and learning.

The following figure depicts the administrative and implementation levels as well as the actors involved in adult learning:

Figure 3: The network of institutions of adult learning

(Source: Márton 2005b, 61, reworked and updated by the author)

Specific characteristics

Under the TÁMOP project 'The development of life-long learning through cooperation among institutions' a situational analysis was carried out (2009) on the standing of Romanian adult training. Based on the findings published in the research project a SWOT analysis was drawn up, too, which characterises Romanian adult training thus:

Strengths:

- There is competent legal regulation for the operation of adult training courses
- The training of marginalised and disadvantaged people (single mothers, the permanently unemployed, Roma people) is realisable
- Encouragement and motivation of participants in the trainings
- Studies that disclose the workforce demand of different industries

Weaknesses:

- An expansive bureaucratic system is in place at different hierarchical levels, especially when applying for certification mainly concerns the training service providers
- High accreditation fees (three average salaries per training)
- The lack of a unified assessment system

Opportunities:

- Providing equal access to any retraining courses within a given profession or industry
- Professional knowledge should be assessed by harmonised standards
- Provision of free and state-supported places in the trainings
- Provision of opportunities for retraining to ensure an easier navigation of the labour market

Threats:

- Mass migration might take effect after the completion of certified trainings due to the social and economic laws applicable in the EU
- An unfair competition may result between tutors and the providers of trainings

Trends in the modernisation of Romanian adult education and the dissemination of the demand for learning among the adult population are formulated on the basis of the annual report of the Directorate of Education and Culture (Direcția de Educație și Cultură, Comisia Europeană, 2017), taking into account the current statistical indices. As Romania proved a straggler in the turnout in adult learning in 2017, as seen in Eurostat statistics (see Table 10), several measures should be optimised in practice. The aforementioned report makes the following three statements on adult education:

1. *The optimisation of vocational training and education is in progress*, even though there are still many challenges. Romania focuses greatly on vocational training, the result of which is that the number of students in vocational schools is higher than the EU average. Despite this it still appears only as a second choice by students in case they should not be admitted to theoretical secondary schools. This is why the appeal of such schools should be increased. The reason for the reservation might be the fact that the proportion of participants in vocational education who have found employment is below the EU average (63% as opposed to the EU's 75%). The chance to increase its appeal might lie in the reinforcement of dual training, which might lead to an easier harmonisation of qualifications, vocational knowledge and the systems of requirements in the workplace.

2. *The rate of adult participation in education is still rather low*, even though there is a great need for the updating of professional competencies. Statistics show that Romania lags far behind (1.2%) the EU average (10.8%) with respect to adult participation in education. Yet, it is exactly the classes of the population that need education the most that refrain from participating. Turnout is as follows: 2.1% of the unemployed (EU average: 9.5%), people with low qualifications: 0.3% (EU average: 4.3%), but the elderly also abstain from learning, as only 0.3% of them join in such programmes, while the proportion in the EU is 6.9%. Reviewing the development of the EU rates, however, we may see that the involvement of adults in the process is in general extremely low, since in ten years there has been a mere increase of 1.1% (MEN, 2016). In Romania the problem might be caused by the fact that the educational system has several fault lines that encourage the status quo. For instance, the system of validating

training history is appropriately developed and in operation, but there is no database on possible courses which adults could consult to choose the courses most in line with their former experience. At the same time, the utilisation of life-long learning opportunities is the lowest in rural areas and villages, in disadvantaged regions, since not only is an appropriate perspective and mentality undeveloped in the first place, but access to trainings is also limited due to the rudimentary educational infrastructure (e.g. there is no school or cultural centre in the village) (Comisia Europeană, 2017).

3. *The implementation of adult training measures is slow.*

- In April 2016 four main goals appeared *in line with the national strategy of adult vocational training and education*: a greater harmony with labour market demands; an increase in participation figures; the improvement of quality; an increase in innovation and international cooperation in vocational training.
- In June 2016 *the national strategy of life-long learning* was approved, which has the goals of increasing turnout and participation and implementing quality management, as well as addressing the strata of the population that are regularly left out of and do not make use of the opportunity of adult education: elderly workers, people with low qualifications, Roma people, women, the populations of villages, young professionals, the disabled. Other significant goals include creating the opportunities for the further development of teachers, adult educators, employers, training service providers, too (Comisia Europeană, 2016).
- In August 2017 a legal framework was set up to establish centres for the realisation of life-long learning, but there was a failure to develop and support the human resources necessary for implementation (adult educators, providers of diversified education activity). This is clearly shown by the fact that the field is very poorly represented in Romanian higher education: it is offered by the Jászváras University as an MA, and in educational science majors as an optional course, but there are no multi-tiered higher educational training programmes developed.
- The updated version of the national training register was not approved. This register would make it possible for participants in

vocational training and certified learners to find appropriate employment in the domestic and European labour market, as per their level of qualification. The dissemination of secondary level vocational training is also made difficult by the fact that the condition of participation is a successful closing exam taken in the upper grades of primary school, which is a real barrier for several potential participants.

According to the summary of the above report from 2017 (Comisia Europeană, 2017), with respect to participation in (formal and non-formal) adult education, the EU average itself (10.8%) falls short of the 15% targeted by 2020, but Romania is an even weaker link in this context, which significantly deteriorates the EU statistics, too. Phenomena connected to education and teaching cannot be totally separated from one another. Our experience is that the introduction of a competence-oriented educational approach and practice is in progress, but at the same time there is a high proportion of students with a low level of base competencies (one of the highest in the EU). The professionals believe the reason for this is the inappropriate level of access to education. The greatest challenge here is to provide Roma and rural-villager students with quality education, especially because education is underfinanced. The risk of early dropout from the system of education is especially high in these social strata, which evidently has an impact on the character of the labour market, but naturally also on the participation in adult education. Due to this, the increase of adults' involvement in education is today more a goal to be achieved than a fact.

Popescu, Popescu and Popescu (2016), based on empirical research, assert that in Romania one of the biggest problems, which is also felt in adult education, is that the country does not invest enough in its younger generations, but also that Romanian society cannot be interpreted as a permanent one where life-long learning could be integrated. There is some presumed irony in the approach, as the authors primarily refer to the continuously changing legal, economic and financial, educational, especially curricular, labour market, etc. frameworks.

In summary of the Romanian situational analysis, it can be established that there were several significant advancements in the network of adult education and learning after the change of regime. The Romanian adult training system was not in an easy position, as it had to reinvent itself from scratch. Catching up with European trends is defined as a major goal, but, as it shows in the monitoring of Romanian education and training, very small steps are taken even though there are opportunities in scenes of formal (especially dual vocational training) and non-formal learning (an ever broadening choice of courses in adult training organisations), as well as in cultural and community learning. (Examining and analysing the above treasure trove is a further step this study and research will have to take.) Naturally, these findings will still have to be diversified and updated, and adults' awareness be raised to make use of these opportunities of training, further training, cultural learning to increase the quality of living.

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Education in Slovakia, with special emphasis on adult education and training

Basic information on Slovakia

Demographics

Slovakia's population in 2001 was 5 379 455, of which 520 528 people, that is, 9.7%, claimed to be of Hungarian descent. The areas inhabited by Hungarians in Southern Slovakia stretch from Bratislava to the Slovakian-Ukrainian border and include five districts: Bratislava, Nitra, Trnava, Banská Bystrica and Kosice. According to the forecasts until 2025, no dramatic change can be expected in the population of Slovakia. Population numbers in 16 townships will remain approximately identical to the current ones; the area including the remaining townships is dominated by the ones where population numbers will be declining. The greatest growth is forecasted in Bratislava and its vicinity, in the northern part of Central Slovakia and the majority of the Eastern Slovakian townships. Whereas the growth of population in Bratislava and its vicinity will be triggered by immigration, in the other areas it will be due to natural population growth.

Occupation and unemployment

Based on the data of SZKSH (Slovakian Central Statistics Office) in the first half of 2009 there were 2 276.1 thousand people employed in Slovakia, including

- 1 978.6 thousand employees,
- 216.1 thousand self-employed entrepreneurs (without any employees),
- 71.9 thousand entrepreneurs occupying employees,
- 1.1 thousand family members assisting in enterprises.

According to the September 2009 data of the Centre of Labour, Social Welfare and Families, the rate of unemployment increased by 0.4%, to 12.45% in Slovakia, which is a four-and-a-half-year maximum. In comparison to the data from September of the previous year, there was a growth of 4.91%. According to the centre, the rate of unemployment will further increase until the end of the year, primarily due to the effects of world economy. Currently 329 860 people are registered in employment offices.

While the employment offices registered almost 49 thousand new unemployed people, approximately 36 thousand were released from the system, including 22 thousand people who had found new jobs. Based on former estimates of the analysts, unemployment will peak at 14% next year.

Currently the rate of unemployment is highest in the Rimavská Sobota township: 32.84%. The proportion of unemployed people in the Revúca township is 30.41%, in the Rožňava township 26.92%, in the Trebišov township 25.04%. The lowest rate of unemployment was measured in Bratislava. In Slovakia jobs are very scarce, there are 48 unemployed people for every job.

The employment offices can offer jobs for 7 and a half thousand unemployed, but the number of unemployed in late August 2009 was over 355 thousand. Of the unemployed almost 320 thousand would be able to start work immediately. The offices, however, do not have all the available jobs in their offer. In Slovakia employers do not have the statutory obligation to notify the offices of their vacant positions. It is in Bratislava that people have the biggest chance of finding a position. In the Slovakian capital the unemployment rate has been at its lowest countrywide, and the city offers the greatest number of vacant positions, too.

Number of vacant positions in the counties

County	Number of vacant positions
Bratislava	2 284
Trnava	1 038
Trencin	707
Nitra	779
Zilina	609
Banská Bystrica	696
Presov	778
Kosice	576
Total	7 467

Strategic developmental schemes in education

The equivalent of the 'NEW HUNGARY DEVELOPMENT PLAN 2007-2013' in Slovakia is titled 'SLOVAKIAN NATIONAL STRATEGIC REFERENCE FUNDS 2007-2013', with two operative programmes that deal with the strategic development of education:

6.1. Educational Operative Programme 2007–2013

The global aim of the operative programme is to ensure the long-term competitiveness of the Republic of Slovakia by restructuring the educational system to meet the needs of a knowledge-based society.

The priority axes of the programme:

1. A reform of education and vocational training

The main goal of the priority axis is to reform primary and secondary education, raise the quality of university education, as well as of human resources used in research and development, and the preparation of graduates to conform to the current and future demands of the labour market and the knowledge-based society. In order to ensure this a strategy was chosen which focused on two key elements: regional education and higher education.

2. Life-long learning as a fundamental pillar of a knowledge-based society

The goal of the priority axis is to create and develop an efficient system of life-long learning and life-long counselling, through the universally accessible development of key competencies and qualifications through life, in harmony with the current and future demands of a knowledge-based society. Adult educational institutions and quality programmes become subsidised, the participation of economically active population in further training programmes, the development of key competencies is promoted, the qualifications of actors of the labour market are permanently increased, and individual training systems become interpenetrable and harmonisable. The programme supports the development of institutional and administrative capacity of health care employees, too.

3. Promoting the training of people with special needs

The main goal is to improve the living conditions, social and cultural environment of disadvantaged groups and individuals with special educational needs, to raise their level of qualification, with special attention to segregated Roma communities. Activities that can be subsidised focus on the primary and secondary education as well as further training of the target groups, and training the professionals who contribute to solving the social, economic, cultural and educational problems of disadvantaged groups.

6.2. Occupational and Social Acceptance Operative Programme 2007–2013

The operative programme implements priority 3.2 within the 3rd strategic priority of NSRK – increasing employment and supporting social acceptance. It includes the two goals of cohesion policy: *Convergence* and *Regional Competitiveness and Employment*. The operative programme is valid for the Bratislava district, primarily because dividing Slovakia for the purposes of realising the two goals of the cohesion policy does not cover the differences in the fields of employment and social acceptance. The other reason is the simplification of administration, control and implementation. The global aim of the programme is to increase the rate of employment, improve the quality of labour market supply, enhance the social acceptance of disadvantaged groups and increase public policy capacities.

Priority 1: Promoting the increase of employment

This priority axis focuses on increasing employment and reducing unemployment taking active measures in the labour market, primarily for young people, the elderly and the permanently unemployed by learning new, current knowledge and enhancing workforce mobility. Other supported fields include increasing the quality of human resources, promoting innovative and flexible working hours, driving back illegal employment, forecasting and managing changes in the structure of the economy and promoting social dialogue. In addition, the reinforcement of administrative capacities of social management, the public and private services is also supported through the acquisition of new competencies.

Priority 2: Promoting social acceptance

Of the activities facilitating social acceptance the strategy of the operative programme is directed at raising the quality and accessibility of social services, child protection, social care services, for all disadvantaged and segregated groups, with special attention to the concentration Roma people in towns and villages, separated and segregated areas. Furthermore, the activities are supposed to mitigate the risk of impoverishment and social segregation, with special emphasis on marginalised Roma communities. A further supported field is human resources development in institutions providing social services.

Priority 3: Increasing employment and promoting social inclusion in the Bratislava district

The activities targeting the enhancement of employment and social inclusion within the goal of Regional Competitiveness and Employment in many cases connect to measures within the goal of Convergence. The global aim of these is to increase the rate of employment, to raise the quality of labour market supply, to enhance the social acceptance of disadvantaged groups and to increase the quality of human resources in public policy.

Reviewing the priorities of competent Slovakian and Hungarian Operative Programmes the following areas ***have significant coherence***:

- improving the capacity for employment;
- life-long learning, enhancing adaptability;
- improving the access to quality education, with special attention to disadvantaged regions.

For all these priorities we recommend launching international operations – ***in harmony with innovative and cohesion policy as well as the efforts of the Hungarian government*** – which the two countries can carry out in a harmonised manner, taking into account the goals stipulated in the OPs, and with an effort to ensure intensive international cooperation during implementation. Such operations might include, from the above fields, an expansion of international cooperation to improve the rate of employment and complex training and occupational programmes promoting social inclusion across borders (with special attention to common tools for the social integration of Roma in Eastern Slovakia and Northern and Eastern Hungary).

Management of education in Slovakia

In Slovakia education belongs in the scope of the Ministry of Education.

Structure of educational management:

1. Advisory bodies in the ministry
2. Budgetary organisations and authorities directly managing education
3. Background institutions of educational management

Advisory bodies of the ministry:

- council for developing curricula
/Kurikulárna rada/
- council for IT in schools
/Rada pre informatizáciu a informatiku v školstve/
- council for children and young people
/Rada pre deti a mládež /
- council for life-long learning and science
/Rada pre školský systém, celoživotné vzdelávanie a vedu/
- council for national minorities
/Rada pre národnostné školstvo/
- council for vocational training
/Rada pre odborné vzdelávanie/
- council for sports
/Rada ministra školstva pre šport/

Budgetary organisations and authorities participating in the direct management of education:

- County Office of Education, Bratislava
/Krajský školský úrad v Bratislave/
- County Office of Education, Nagyszombat
/Krajský školský úrad, Trnava/
- County Office of Education, Trenčsén
/Krajský školský úrad, Trenčín /
- County Office of Education, Nyitra
/Krajský školský úrad, Nitra/
- County Office of Education, Besztercebánya
/Krajský školský úrad v Banskej Bystrici/

- County Office of Education, Zsolna
/Krajský školský úrad, Žilina/
- County Office of Education, Eperjes
/Krajský školský úrad, Prešov/
- County Office of Education, Kassa
/Krajský školský úrad, Košice/
- Pedagogical and Methodological Centre, Bratislava
/Metodicko-pedagogické centrum, Tomášikova 4, Bratislava/
- State Office of Vocational Training
/Štátny inštitút odborného vzdelávania/
- National Centre for Sports
/Národné športové centrum/
- State Institute of Pedagogy
/Štátny pedagogický ústav/
- Slovakian Library of Pedagogy
/Slovenská pedagogická knižnica/
- Research and Development Agency
/Agentúra na podporu výskumu a vývoja/
- Agency of the Ministry of Education managing the EU structural fund
/Agentúra Ministerstva školstva Slovenskej republiky pre štrukturálne fondy EÚ/
- State Office of the Educational Inspectorate
/Štátna školská inšpekcia/
- National Office managing state certifiers
/Národný ústav certifikovaných meraní vzdelávania/

Background institutions of educational management

- Scientific and Technical Information Centre of Slovakia
/Centrum vedecko-technických informácií SR/
- Academia Istropolitana
/Academia Istropolitana /
- Research Institute of Child Psychology and Pathopsychology
/Výskumný ústav detskej psychológie a patopsychológie /
- Slovakian Anti-doping Agency
/Antidopingová agentúra SR/

Regional management of education

The county local governments ensure the state administrative duties in education via the county offices of education under their supervision, with special emphasis on the following fields:

- supplying professional activity at the second level of decision-making in matters that at first level belong in the decision-making scope of secondary school principals
- supplying professional activity in supervision, the observance of general laws in schools and educational institutions and exercising the competence of the state educational inspectorate in the county.
- supplying professional activity to school principals when developing organisational guidelines for the given school year.
- supplying professional activity in training and counselling for schools and educational institutions and school catering
- supplying professional activity in supervising the further training of teaching employees

The financing of regional education is normative in kind.

The institutional background of the management of vocational training in Slovakia

The professional management of vocational training and the development of the content thereof belong in the exclusive scope of the Ministry of Education of the Republic of Slovakia, where the competent field is supervised by the department of vocational training operating in the current organisational framework as part of the section responsible for public education. The aforementioned organisational unit has eight employees, and the tasks that have ethnic relevance, too, are handled together with the department for the education of minorities. Directives are received by the institutions from the central body of state administration via the owners of the schools, evidently and primarily via the county local governments. The decisions are made in the ministry, but the analysis, schemes and other information necessary for passing the resolutions are provided by the ministry's background institution, the National Institute of Vocational Training (*Štátny inštitút odborného vzdelávania*). Here was the standard of Slovakian secondary vocational training (*Štandard stredoškolského odborného vzdelávania a výchovy v Slovenskej republike*) developed, too,

which the ministry approved in 2002, and which document is the basis of developing educational framework programmes. The material analyses the problem of key competencies in detail as well as target requirements at different levels of the ISCED system and different vocational courses, furthermore, the general and professional components of vocational trainings and their possible directions. The only flaw of the system is that it ignores national minority institutions, providing them with no guidelines. The primary reason is that in lack of appropriate professionals (and intentions) — differently from the National Institute of Pedagogy — the vocational training research institute does not deal with the problem of teaching national minorities separately or its specificities, and no special pedagogical documents are developed for schools that teach in languages other than Slovakian.

The ownership of vocational training institutions, and the cooperation between vocational training and the labour market

In Slovakia secondary institutions providing vocational training can be owned by county local governments, churches or private individuals. The conditions of establishing a school are provided by law. In some cases the school does not belong in the scope of the Ministry of Education but operates under the supervision of some other ministry. The owner is responsible for providing young people with vocational knowledge, designing and managing it, but at the same time it has to create favourable circumstances for the development of students. The funding of vocational education is carried out from the state budget, the rules of which are specially provided for by law (Act No. 597/2003). The signing of contracts is regulated by a government decree. The vocational training institutions cannot separate themselves from the practice of finances, they cannot be independent of the labour market, as they can only perform efficient and rational work by taking into account the market demands. This is a circumstance that the ministry supervising the matters of vocational training cannot ignore. Therefore, the competent department of the ministry of education holds regular meetings with the representatives of the Slovakian Chamber of Commerce and Industry and of the organisations of different employers, as well as social partners, and they discuss current development and organisational problems, articulating joint tasks.

By reviewing the minutes and memoranda of such meetings, we may infer that more flexible regulation of content is needed with respect to the market, and that the graduates of schools could be made more competitive by lengthening the primary training and introducing life-long learning.

Adult education¹

Life-long learning is provided for in Act No. **568/2009**¹⁷ in Slovakia.

Life-long learning, as a fundamental principle of education and learning is divided into two stages:

- a.) school education
- b.) further training (adult education), which is built on the qualifications obtained at school

School education – vocational training – was discussed previously, so let us take a look at the aspects of adult education. Adult education is an integral part of the educational system of the Republic of Slovakia alongside primary, secondary and higher education.

Adult education is carried out in further training (adult training) institutions and is adjusted to school qualifications. It provides full or partial qualifications, also supplementing, updating, expanding or making more thorough any qualification obtained at school as well as fulfilling the ambitions of people who wish to learn. The successful completion of further training does not provide school qualifications.

Types of further training:

- **Vocational training** – in the framework of an accredited educational programme, providing an appropriate qualification for some professional activity or supplementing, updating, expanding such.
- **Requalifying training** - in the framework of an accredited educational programme, providing partial or full – vocational – qualifications for the performance of one or several professional

¹ The subchapter was authored by Mária Fabó.

activities, utilisable in a profession other than which the participant has received school qualifications for.

- **Continual training** – in the framework of educational programmes with which the participant supplements, updates, expands or makes more thorough their qualification obtained at school or in a requalifying training.
- **Training to a special interest, training of seniors, other training** – in which the participant expands their own circle interests and develops their personality.

School training belongs in the category **of formal education**, while further training in **non-formal education**.

Three kinds of institutions can carry out adult training.

- **School** – grammar schools, vocational secondary schools, conservatories, special vocational schools, primary art schools, language schools and colleges which provide educational programmes besides school training – these are accredited institutions.
- **Legal entity** – parties whose activities include education and the related activities.
- **Physical person** – entrepreneurs whose activities include education and the related activities.

In Slovakia the system of adult training is a work in progress, for the time being, developing under uncontrolled conditions and unresolved. According to different statistics there are currently 2500-3000 adult training institutions in Slovakia.

Vocational training includes, besides the network of vocational schools, adult education and retraining programmes and training courses. With Slovakia's EU accession, new serious opportunities appeared for tender subsidies. At the same time, owing to the unprepared state of institutions and the lack of cooperation the accessible funds sometimes remain unutilised.

Local governments, such as the owners of schools, struggle with a lack of funds, and are unprepared, in many cases not managing to 'do something' about the development of these institutions, but no professional organisation at all takes care to develop vocational training institutions.

The professional management and content development of the process of vocational training belongs in the exclusive scope of the Ministry of Education of the Republic of Slovakia, where the field in question is supervised by the department of vocational training operating in the current organisational framework as part of the section responsible for public education. Directives are received by the institutions from the central body of state administration via the owners of the schools, evidently and primarily via the county local governments.

The decisions are made in the ministry, but the analysis, schemes and other information necessary for passing the resolutions are provided by the ministry's background institution, the National Institute of Vocational Training (*Štátny inštitút odborného vzdelávania*). Here they prepared the standard of Slovakian secondary vocational training (*Štandard stredoškolského odborného vzdelávania a výchovy v Slovenskej republike*), too, which the ministry approved in 2002, and which document is the basis of developing educational framework programme. The material analyses the problem of key competencies in detail, as well as target requirements at different levels of the ISCED system and different vocational courses, as well as the general and professional components of the vocational training and their possible directions.

The vocational training institutions cannot separate themselves from the practice of finances, they cannot be independent of the labour market, as they can only perform efficient and rational work by taking into account the demands.

This is a circumstance that the ministry supervising the matters of vocational training cannot ignore. Therefore, the competent department of the ministry of education holds regular meetings with the representatives of the Slovakian Chamber of Commerce and Industry and of the organisations of different employers, as well as social partners, and they discuss current development and organisational problems, articulating joint tasks.

By reviewing the minutes and memoranda of such meetings, we may infer that more flexible regulation of content is needed with respect to the market, and that the graduates of schools could be made more competitive by lengthening the primary training and introducing life-long learning.

A Summary of Education in Slovakia

The Slovakian system of education is managed by the Ministry of Education. In Slovakia the Constitution ensures that there is a possibility to providing education in the students' native tongue, but the effective laws do not define education for national minorities. Institutions that teach in Hungarian are Hungarian-language versions of the Slovakian schools, bearing certain specific characteristics with respect to national minorities. In schools the subjects are taught in Hungarian, but in vocational secondary schools this is true for only some of the vocational subjects. The content of education is determined by the National Programme of Cultural Education (Štátny vzdelávací program), created in 2008, which the schools have a possibility to supplement with their own school curriculum, stipulating their priorities related to the school's educational principles, forms of education and methods. The legal regulation of public education is the responsibility of the Ministry of Education.

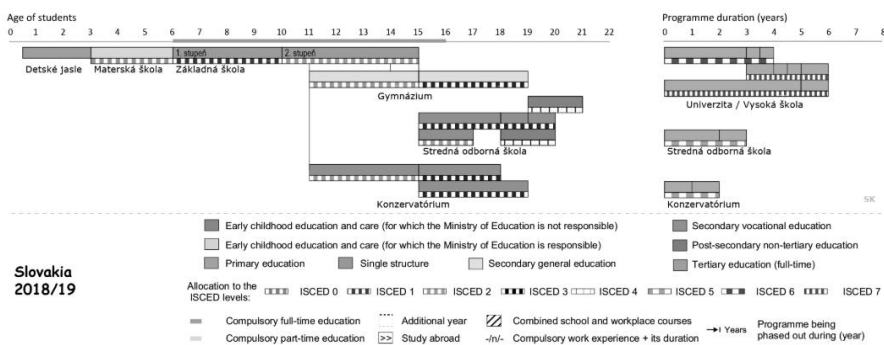
Managing matters related to the education of national minorities at the Ministry falls under the scope of the National Minority Department. The professional control of schools, as well as national minority schools, is carried out by the Ministry's background institutions: the State Institute of Pedagogy (ŠPÚ), the National Institute of Standardised Assessment (NÚCEM), the Centre for Pedagogical Methodology (MPC), the Institute of Vocational Education (ŠIOV), etc. The operating cost of state-owned educational institutions is covered by the state. The ownership rights of schools are exercised by municipalities in the case of primary schools and county local governments for secondary schools, but there are church-owned and private schools, too. The supervision of schools is performed by the educational inspectorate. As per the law school documentation is obligatorily bilingual. School councils are internal bodies of schools with local governmental competences, which include appointing the school principal, too. The number of schools and the student headcount have been

on the decrease continually since the change of regime, that is, the establishment of Slovakia (Table 1). The education of the Hungarian minority in Hungary has a well-developed network even today. The 263 Hungarian-language schools constitute 12% of all schools in Slovakia. The fall in student numbers is evident from the statistics. Between the academic years 2003/4 and 2013/14 32 Hungarian schools were terminated, and the number of students decreased by 7875. On the basis of statistics by the former Institute of Information and Prognosis, before the change of regime, 25% of students of Hungarian national minority status went to Slovakian educational institutions, which ratio is 13% today. The majority of nursery schools have Hungarian education in towns with Hungarian population, but there are a significant number of Hungarian-Slovakian bilingual nursery schools, too. Parents' demands for Hungarian or Slovakian nursery schools cannot always be satisfied by local governments, therefore, today bilingual groups are set up, too, where the courses are in both languages, in accordance with the children's command of languages. The proportion of lower-grade schools is substantial in the Hungarian network, with approximately 50%, of which 86 schools, two thirds, have student numbers below 20. There are Slovakian-Hungarian joint management schools (10% of all schools), which have been created as a result of state centralisation efforts. The intention to introduce so-called alternative education has been raised by the government several times in the past decades, lastly in 1995. This was supposed to ensure that most of the subjects would be taught in Slovakian.

Due to the changes Hungarian public education in Slovakia since the change of regime and the political transformation, in January 1990 the professional and national minority advocacy organisation of Slovakian Hungarian teachers, the *Association of Slovakian Hungarian Teachers* (SZMPSZ) was set up. Thanks to the freer social atmosphere and the efforts of the parties, SZMPSZ and the Association of Slovakian Hungarian Parents (SZMSZSZ), the primary schools, which had been closed down due to centralisation, were reopened, and new private and church schools were established. The years between 1994 and 1998 were a period of protecting Hungarian schools.

Mass protests were organised countrywide against the 'alternative scheme' striking down Hungarian education and the educational decrees and measures by the state prohibiting the issue of bilingual certificates. Due to the protests several school principals were dismissed, but the changes planned by the OM were prevented. After the parliamentary elections of 1998 the independence of the institutions strengthened. Between 2000 and 2006 the schools were transferred to the ownership of municipalities, a normative support system based on a capitation formula was put in place, and the legal scope of school councils was expanded. A favourable legal environment was secured for education in the native tongue. The decentralisation of operation and educational management increased, and the principles of subsidiarity were better realised.

Figure 1: The Slovakian Hungarian school system



(Source: https://eacea.ec.europa.eu/national-policies/eurydice/content/slovakia_en)

Secondary school. This is the second phase of mandatory education, an institution of secondary education, where students successfully completing their primary studies are admitted. Its duty is to provide general and/or vocational training based on basic learning. Since in Slovakia the school leaving age is 16 (entailing 10 years of school altogether), all students are obliged to attend until the age of 16. Different types are grammar school, vocational secondary school and conservatory.

After completing their studies here students can take a maturity (school-leaving) examination or vocational exam based on their specialisation, and are granted the according qualification. Successfully finishing secondary school is a precondition for participating in higher education.

Grammar school. Its duty is to prepare students for the maturity exam and studies in higher education. There are several types of grammar schools with respect to the duration of studies (four- and eight-year), and they can hold classes of different specialisation. In accordance with bilateral cultural agreements signed by Slovakia bilingual grammar schools can be established, with a training duration of 5 years.

Vocational secondary school. A type of secondary school which provides basic learning as well as secondary level vocational training, but also prepares students for higher education. It can be completed by taking a maturity exam also assessing vocational skills, but it also trains skilled labourers for industry, agriculture and commerce. In this case the theoretical and practical training is finished with a vocational exam. Practical studies can be conducted in different industries as per market demands.

Secondary sports school. A secondary sports school is an internally divisioned secondary school preparing students with sports talents in a given sports specialisation. The educational programmes of secondary sports schools ensure that talented young sportspeople are prepared for their college studies and professions and professional activities related to sports. The education provided here develops the knowledge, agility and skills of the students talented in sports, which were obtained during earlier trainings, and supplies the knowledge, agility and skills needed for professions and professional activities related to sports. The secondary sports school provides specialised secondary-level learning, complete secondary-level general learning and complete secondary-level specialised learning.

Conservatory. Conservatories provide comprehensive learning in arts and the teaching of arts. They prepare students how to realise themselves as qualified artists, and teach arts subjects and special subjects in the framework of arts-oriented educational programmes.

Tertiary education. The third level of education (based on the primary and secondary levels). Its autonomous network – with respect to content and organisation – is constituted by institutions (colleges and universities) operating under the higher educational law, and these provide degrees with specific professional qualifications after their different types of training with different durations. The training is divided into three tiers: bachelor's (Bc.), master's (Mgr.) and postgraduate (Ph.D.). The duties of the institutions alongside the training activity involve scientific research. Official Hungarian-language education is currently carried out in all faculties of the Komárno-based Selye János University (pedagogy, economics, Reformed theology), the Faculty of Central European Studies at Nitra-based Konstantin University, at the Hungarian Lit. and Lang. Department of the Faculty of Humanities at Comenius University in Bratislava and the Hungarian Studies Department at the Faculty of Philology at Bél Mátyás University, Banská Bystrica.

Hungarian teachers are trained at *Comenius University, Selye János University and at the Faculty of Central European Studies, Konstantin University of Philosophy*. With the current continuous development of the faculties the number of graduates is on the increase. The lack of Hungarian teachers, which has caused problems in the past decades, is over, and due to decreasing student headcounts in Hungarian schools, there is an oversupply of teachers. In all three institutions there are bachelor's (Bc.), master's (Mgr.) and doctoral (PhD) trainings.

Municipal university. One of the specific forms of higher education is the schools established by municipalities, generally providing three-year courses (Bc.). In the past period such Hungarian institutions were set up in Komárno and Kráľovský Chlmec.

State- or municipally owned school. A school which is owned by the state. Since the decentralisation of administration in 2002 these function as municipal schools in Slovakia. They operate on a state budget, but the multiple-source funding as per the effective laws require that the municipality or county local government owing the school contribute, too. The state undertakes to finance schools with other owners — a church, private individual — to the same extent.

Church school. A school in the ownership of one of the official churches, which is different primarily due to its mentality of education, the emphasis on religious and moral values. In accordance with the competent laws it receives normative support from the state. As a result of the reinstatement after the change of regime, the church was restored to its fortune, and due to statutory amendments church schools, which had played a great part throughout the centuries, were allowed to relaunch their activities. Today they can be found at all levels of education.

Private school. An educational institution whose founder and owner is a private individual or legal entity. In Slovakia these reappeared only after the 1989 change of regime. Their subsidising is performed from several funds: they are entitled to state normative funds as well as require tuition fees. The curriculum is determined by the school's management but they have to be in harmony with the competent laws and other regulations.

Schools for children and students with special educational needs. A school for the handicapped different from traditional primary or secondary schools, which deal with the education of students with special needs. Since the school-leaving age binds such students as well, it is the state's duty to organise their operation and funding.

Joint management school. In the Slovakian Hungarian terminology this is the type of institution in which there are both Hungarian- and Slovakian-language classes and these operate under joint management. They can be found primarily in towns where the population of the Hungarian community is not sufficient to run an individual institution.

Educational background institution. An organisational unit under the supervision of the Ministry of Education, which is tasked primarily with research, assessment, evaluation and quality management. In Slovakia there are several such institutions, in which school standards, curricula, syllabi and different tests and exams are developed, as well as having professionals who approve the use of textbooks and educational tools. The shortcoming of the system is that there is no independent background institution or autonomous group that deals with the problems of education for national minorities.

Organisations related to education:

Katedra Society publishes the pedagogical periodicals *Katedra* and *Pedagógusforum* through *Lilium Aurum Publishing House*. The *Association of History Teachers* was established at a national level, which formulates its positions in matters of representation and advocacy alongside professional help for teachers. In the framework of SZMPSZ the *Pázmány Péter Foundation (PPA)* and *Comenius Pedagogical Institute (CPI)* were set up. The PPA assists in transferring the educational subsidies of students in Hungarian-language education to the parental societies of the schools, in accordance with the allowance law. CPI promotes the professional development of Hungarian teachers through further trainings, professional programmes and publications.

Owing to the state of public education, since 2006 SZMPSZ, on behalf of Hungarian educational institutions, has been reacting more and more harshly to the Ministry's policies against Hungarian-language education. Some examples of the measures include the relegation of the major department of national minorities to a mere department, the dismissal of Hungarian teachers, the reduction of Hungarian-language classes in lower grades, the delimitation of Hungarian place names in Geography books, the increase of administrative costs of bilingual documentation, the lower than average success rate of Hungarian schools in EU tenders. The biggest problem in schools is the defective supply of textbooks, while the Ministry called upon the schools for an enhanced teaching of Slovakian. In 2011 the Komárno department of the *Centre for Pedagogical Methodology* was set up, which undertakes duties in teacher further training. The amendment of school law passed in December 2013 threatens schools of low headcounts, including a significant number of Hungarian-language institutions.

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Educating national minorities in the native tongue in Ukraine (the Subcarpathian region)

Ukraine's educational system – The structure of the new educational (public educational) system, linguistic problems of education

The new law on education (general framework law) passed by the Ukrainian parliament on 5 September 2017 set the goal of modernising public education through reforms from September 2018, including raising the duration of mandatory primary and secondary education from 11 to 12 years and reducing the number of subjects from the current 22 to 9. The law provided schools with substantial autonomy and prescribed a pay rise for teachers. The law stipulates a structural reform, too: the *first stage* lasts from 1st to 4th grade (primary), the *second* from 5th to 9th grade (general middle school), and the *third* between 10-11th grade (secondary school)¹ (*Fedinec-Cserniczkó* 2017a, 7-8).

According to the new public education scheme (Fig. 2), *nursery school education* lasts until 6 years of age, *primary school education* lasts for 4 years (between ages 6-10), in which identical requirements are introduced.²

¹ Act No. 2145-VIII on education passed on 5 September 2017, which entered into force on 28 September 2017.

² An organic part of the educational system: preschool education; complete general middle school education; extracurricular education; special education; vocational education; higher education; adult education and postgraduate training (Source: ЗАКОН УКРАЇНИ Про освіту - <http://www.golos.com.ua/article/294010>).

The structure of the new Ukrainian school

СТРУКТУРА НОВОЇ УКРАЇНСЬКОЇ ШКОЛИ

I. ПОЧАТКОВА ШКОЛА

1 2 3 4 4 роки

II. БАЗОВА СЕРЕДНЯ ШКОЛА (ГІМНАЗІЯ)

5 6 7 8 9 5 років

III. ПРОФІЛЬНА СЕРЕДНЯ ШКОЛА

10 11 12 3 роки

Академічного спрямування - академічний ліцей

Професійного спрямування - професійний ліцей

Figure 2: The new structure of the school system

I. PRIMARY EDUCATION – 4 years



II. BASIC SCHOOL (GRAMMAR SCHOOL) – 5 years



III. SPECIALISED SECONDARY SCHOOL – 3 years



Academic level educational institutions – grammar schools (preparing students for admission to university)

Vocational educational institutions – vocational grammar schools (vocational education)

Primary school starts in fifth grade (basic school, grammar school), which have a duration of five years. The number of subjects is increased in grades 5–9. After completing the ninth grade all students have to take an independent test. On the basis of such independent, external assessment they can go on to further education. On the basis of the test the law makes possible two directions: 1) vocational education or 2) education in a grammar school providing a maturity exam and qualification in grades 10–12, which prepares the student for higher education and the entrance exam.¹ The structure of private institutions can deviate from that – as they could deviate from it in the past, too² (Act No. 2145-VIII on education passed on 5 September 2017, which entered into force on 28 September 2017; *Fedinec and Csernicskó* 2017a, 7-8).

The prescriptions of the new law are implemented in several phases. In accordance with the effective law, education as per the reform was launched on 1 September 2018. Those that had already started their education before this could carry on their studies as per the earlier law, until 1 September 2020, when they will come under the ruling of the new regulation, so the previous system is not traced to its end (chapter XII, section 3/18 of Act No. 2145-VIII on education passed on 5 September 2017, which entered into force on 28 September 2017; *Fedinec and Csernicskó* 2017a, 7-8).

Ukrainian educational institutions used to be of several types as per their language of education. With respect to Hungarian-language education, the following types prevailed³ (*Csernicskó and Melnik* 2007, 26-27):

- I. **Type 1.** Schools with Hungarian as the language of education, where the teaching of the language of the state, Ukrainian, is mandatory, with one (or several) foreign languages (English, German or French) as required options.
- II. **Type 2.** Schools with classes taught in Ukrainian and classes taught in Hungarian. In these latter classes the state language

¹ The network of higher education: level I – colleges (3-4 years, BSc), level II – universities (master's) (1.5-2; 1-2 years, MSc). These are topped off by doctoral training (Ph.D.).

² A kárpátaljai magyar nyelvű oktatás története [The history of education in Hungarian in Subcarpathia]. (<http://kmf.uz.ua/hu/karpataljai-magyar-nyelvu-oktatas-tortenete/>)

³ The situation was the same in the academic year 2017-2018.

- (Ukraine) is mandatory, with one (or several) foreign languages as required options.
- III. **Type 3.** Schools with the state language (Ukrainian) as the language of education, and besides that Hungarian (as a native tongue) is a required subject; with one (or several) foreign language(s) as required options.
 - IV. **Type 4.** Schools with the state language (Ukrainian) as the language of education, and besides that Hungarian (as a native tongue) is an optional subject, with one (or several) foreign language(s) as required options.
 - V. **Type 5.** Schools with the state language (Ukrainian) as the language of education, and besides that one foreign language is a required subject, with Hungarian as an optional second language.
 - VI. **Type 6.** Hungarian parents, naturally, have the right to choose a school for their children in which the language of education is Ukrainian, and where (one or more) foreign languages are taught mandatorily, and the native tongue of the children (Hungarian) does not appear in the process of education at all (*Csernicskó and Melnik* 2007, 26-27).

According to the new law on education, the language of education is the state language in educational institutions.

However, the new law distinguishes between national minorities and native people with respect to the language of education.⁴

As per section 7 subsection 1 of the law on education, for members of native people *the right to education in one's native tongue is limited to the preschool and general middle school levels* (section 7 subsection 1 of Act No. 2145-VIII on education passed on 5 September 2017, which entered into force on 28 September 2017; *Fedinec and Csernicskó* 2017a, 7-8).

However, people of national minorities are only granted the right to education in their native tongue alongside the state language in local government-owned institutions. This possibility exists only in preschool and the general middle school levels (1–4th grades). In grades 5–12, in vocational education, as well as in higher education, the native-language

⁴ In Ukraine, as per the law, the only native people are the Crimean Tartars, Subcarpathian Hungarians are not.

education of national minorities is terminated. The minority language can only be taught as a subject, and the legislators concede that one or more subjects can be taught in one or more languages – the state language, English, other official languages of the EU⁵ (section 7 subsection 1 of Act No. 2145-VIII on education passed on 5 September 2017, which entered into force on 28 September 2017; *Csernicskó* 2018; *Fedinec and Csernicskó* 2017, 292-93).

The law also terminates the independence of schools teaching in the language of national minorities. The above-defined right can be exercised in separate classes (groups), in institutions teaching in Ukrainian. The part of the law on the language of education is a tool for Ukrainianising the country's society, wielded by the powers that be (*Constantinovits* 2018; *Pallagi* 2017; section 7 subsection 1 of Act No. 2145-VIII on education passed on 5 September 2017, which entered into force on 28 September 2017; *Fedinec and Csernicskó* 2017a, 8; *Csernicskó* 2018; *Fedinec and Csernicskó* 2017, 292-93).

Ukraine's (Subcarpathia's) educational system with respect to figures and statistics

Nursery school education

According to data as of 31 January 2017, 14.9 thousand nursery schools/ crèches were in operation in Ukraine, with a population of 1.3 million children. This is only 55% of nursery-school-age children (Міністерство освіти і науки України; ОСВІТА В УКРАЇНИ (дошкільна, загальна

⁵ Notes on section 7 of the law: The reasoning of the law, according to which education must be structured as per section 7 because the students of national minorities achieved very bad results in the independent tests, is unjustified.

Section 7 curtails the rights to education in one's native language.

Section 7 threatens obtained rights that have existed for a long time and have great history.

Section 7 is discriminative, dividing Ukraine's citizens in four groups with extremely different rights.

Section 7 has imprecision and ambiguities, thus it creates legal uncertainty.

Section 7 cannot be harmonised with Ukraine's international obligations.

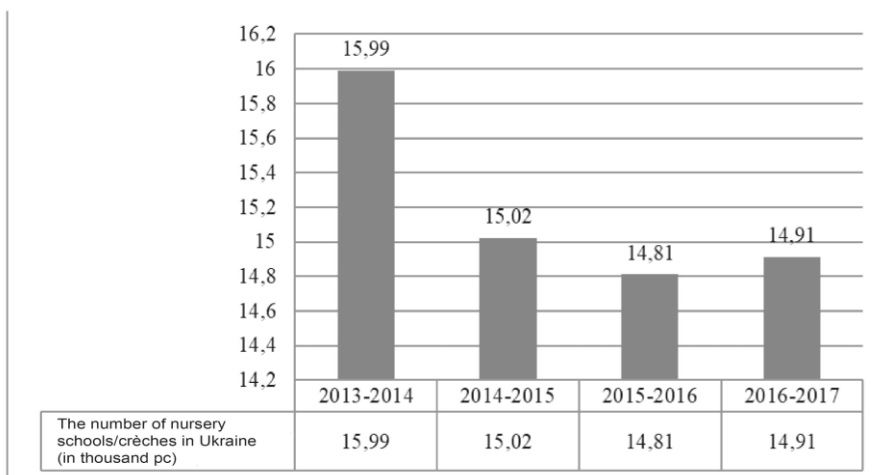
Section 7 is unconstitutional.

Section 7 contradicts several Ukrainian national laws.

Section 7 does not provide any solution to the main problem of the education of the Ukrainian language: the Ukrainian state has still not created the conditions of teaching the Ukrainian language.

середня, позашкільна). Інформаційно-статистичні матеріали за результатами діяльності у 2016/2017 н.р. – Підготовлено Інститутом освітньої аналітики. Київ – 2017.) (Figures 3-4)

Figure 3: The number of nursery schools/crèches in Ukraine (in thousand pc)



In Subcarpathia at the same time 592 nursery schools and crèches were in operation with 40379 children (ОСВІТА В УКРАЇНИ, 2017).

In a breakdown by language of education, 93.7% of the nursery schools and crèches (14011 nursery schools and crèches) used Ukrainian as the language of education. The proportion of Hungarian-language nursery schools and crèches in the year under survey was 0.51% (76 nursery schools and crèches) (ОСВІТА В УКРАЇНИ, 2017). (Figure 5)

Figure 4: Number of children in Ukrainian nursery schools and crèches (in million persons)

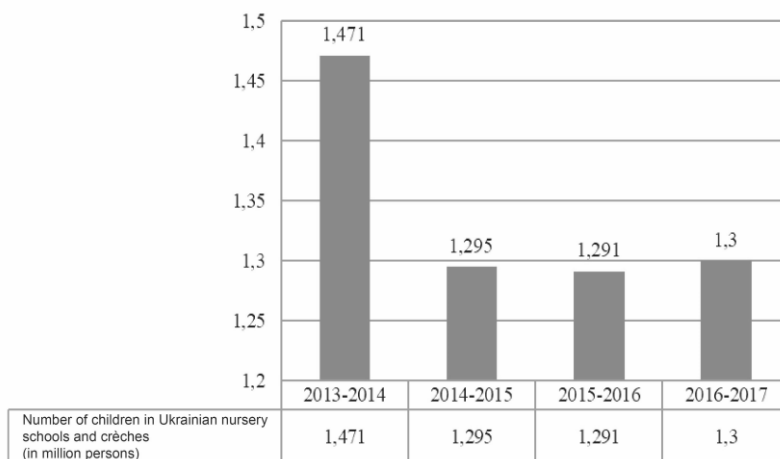
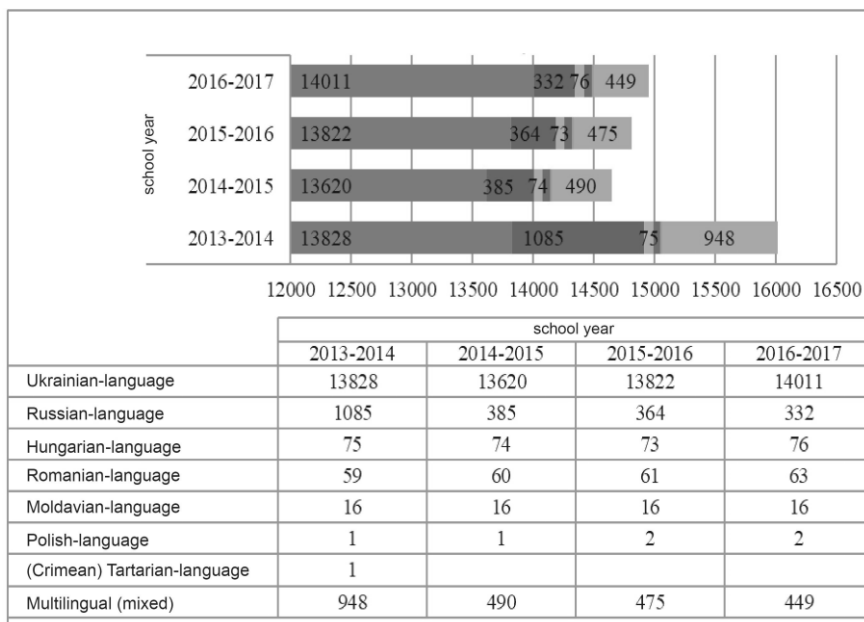


Figure 5: Number of nursery schools and crèches in a breakdown by language of education



On the basis of data by the Ukrainian Ministry of Education and Science, the greatest number of nursery schools were in operation in Dnipropetrovsk county: 974 nursery schools (population of children: 115343). With respect to the places in nursery schools the best situation was in Luhansk County (90 children for 100 places), as well as Donetsk and Kherson counties (97 children for 100 places). In this field the worst indices are found in Ivano-Frankivsk County (131 children for 100 places), Lemberg County (129 children for 100 places), Volyn County (127 children for 100 places) and Poltava County (126 children for 100 places). (Міністерство освіти і науки України; ОСВІТА В УКРАЇНИ (дошкільна, загальна середня, позашкільна). Інформаційно-статистичні матеріали за результатами діяльності у 2016/2017 н.р. – Підготовлено Інститутом освітньої аналітики. Київ – 2017.)

Table VI: The headcount of staff in nursery schools, 2014-2017

	2013-2014	2014-2015	2015-2016	2016-2017
<i>Ukrainian-language</i>	1257557	1214199	1216456	1232169
<i>Russian-language</i>	202669	70638	64677	57283
<i>Hungarian-language</i>	4755	4952	5031	5232
<i>Romanian-language</i>	3493	3397	3406	3480
<i>Moldavian-language</i>	1200	1281	1304	1325
<i>Polish-language</i>	106	125	141	137
<i>Slovakian-language</i>	22	76	115	115
<i>English-language</i>				316
<i>German-language</i>	22	23	22	28
<i>Hebrew-language</i>	51	25	24	24
<i>(Crimean) Tartarian-language</i>	830		19	20

Source: (ОСВІТА В УКРАЇНИ, 2017)

In the academic year 2016-2017 the headcount of staff in Ukrainian-language nursery schools was 1257557. In Hungarian-language nursery schools the number was 5232. (OCBITA В УКРАЇНИ, 2017) (Table VI)

Public education

In the academic year 2014/2015 in Ukraine (with the exception of the invaded Crimean Peninsula and the areas of Donetsk and Luhansk counties not controlled by Kiev) 3,675,076 children attended 17,090 state-owned schools (THIRD PERIODIC REPORT OF UKRAINE'S IMPLEMENTATION OF THE EUROPEAN CHARTER FOR REGIONAL OR MINORITY LANGUAGES Kiev, September 2015, 193-94) (Table VII). The number of Hungarian-language state schools was 68 (children here attended schools of type 1). Hungarian-language classes were taught in a further 27 state schools (type 2). Altogether 15,172 children attended Hungarian-language schools/classes in state schools in the country in 2014/2015. In the network of state schools 0.41% of the children studied in Hungarian (THIRD PERIODIC REPORT OF UKRAINE'S IMPLEMENTATION OF THE EUROPEAN CHARTER FOR REGIONAL OR MINORITY LANGUAGES Kiev, September 2015, 193-94).

Children studied in altogether 27 languages in some manner: Ukrainian, Russian, Romanian, Crimean, Moldavian, Polish, English, Slovakian, Bulgarian, Gagauzian, German, Ivrit, Spanish, French, Japanese, Czech, Korean, Arabian, Hindi, Danish, Italian, Chinese, Norwegian, Persian, Turkish, Finnish, Swedish.⁶

⁶ One can study Latin of all the dead languages (as a subject).

**Table VII: Distribution of schools and students
in Ukraine in a breakdown by the language of education
as per data as of 1 January 2015**

Languages	Number of schools teaching in the given languages	Number of students studying in the given language	Number of students studying the given language as a subject	Number of students studying the given language as an optional subject
Total	17090	3675076		
<i>Ukrainian</i>	15696	3281644	393188	
<i>Russian</i>	621	362262	1023797	111506
<i>Romanian</i>	78	19808	972	294
Hungarian	68	15172	698	791
<i>Moldavian</i>	5	2984	2373	241
<i>Polish</i>	5	1594	26301	10762
<i>Bulgarian</i>		78	8103	863
<i>Slovakian</i>		134	180	646

*Source: Third periodic report of Ukraine's implementation of the European charter for regional or minority languages
Kiev, September 2015, 193-94.*

As per the May 2017 data up to 3822051 million studied in 16858 schools (primary, general middle and secondary) in Ukraine. Of these there were 16678 state and municipal schools, 180 private educational institutions; in the latter the number of students was 23466. In 89.7% of state and municipal schools the language of education is Ukrainian, in 9.4% it is Russian, with 55% and 41.1% in private schools. The remainder are other languages, including Hungarian (71 schools). (*Fedinec and Csernicskó* 2017, 290; 2017a, 8; Аналітичний портал „Слово і Діло”. 19 травня 2017) (Tables VIII-IX).

Table VIII: Distribution of schools and students in Ukraine in a breakdown by the language of education in 2014-2017⁷

Languages	Academic year							
	2013-2014		2014-2015		2015-2016		2016-2017	
	Number of schools	Number of schools	Number of schools	Number of schools	Number of schools	Number of schools	Number of schools	Number of schools
<i>Ukrainian</i>	16045	3352871	15696	3281644	15476	3316459	15020	3376785
<i>Russian</i>	1275	703572	621	356262	614	351948	581	355955
<i>Romanian</i>	81	17518	78	16808	75	16426	75	16139
<i>Hungarian</i>	67	15001	68	15172	69	15135	71	16020
<i>Moldavian</i>	5	3087	5	2984	3	2797	3	2693
<i>Polish</i>	5	1526	5	1594	5	1698	5	1785
<i>English</i>	1		1					
<i>Multilingual (mixed)</i>	1205		616		594		610	

Source: OCBITA В УКРАЇНИ, 2017

In the capital the proportion of Ukrainian-language schools is 97.1%, that of Russian-language ones is 2.7%. Of the 24 counties of Ukraine in 15 the proportion of Ukrainian-language schools is 98-100%. Near the western borders (Subcarpathia), in two southern counties (Chernivtsi and Kherson), as well as in Dnipropetrovsk County neighbouring the war-stricken counties, this number is 80-90%, in two other counties bordering on the war zone (Kharkiv and Zaporizhia) it is 70-75%. The proportion of state-language schools is lowest in Odessa County along the southern border of Ukraine (69.5%) and the areas of the two war-stricken counties, Luhansk and Donetsk, not affected by armed conflict (65.1 and 59.5%)⁸ (*Fedinec and Cserniczkó* 2017, 290; 2017a, 8; Аналітичний портал „Слово і Діло”. 19 травня 2017).

⁷ With the exception of boarding schools and night schools.

⁸ In Subcarpathia the proportion of Ukrainian-language schools is 87.1%.

Table IX: The distribution of schools and students in Ukraine with respect to the language of education in a breakdown by regions, 2017⁹

Areas (counties)	Distribution as per the language of education													
	Hungarian		Moldavian		Polish		Romanian		Russian		Ukrainian		Total	
	1	2	1	2	1	2	1	2	1	2	1	2	1	2
Volyn area											657	132814	657	132814
Dnipropetrovsk area									100	55589	810	260790	910	313379
Vinnitsia area											855	157154	855	157154
Donetsk area									100	45079	439	110430	539	155509
Zhytomyr area											700	130362	700	130362
Transcarpathian area (Subcarpathia)	53	9643					12	2579	3	1268	5390	145437	658	158921
Zaporizhia area									81	35616	475	124464	556	160080
Ivano-Frankivsk area					1	907			1	26	701	148818	703	149751
Kiev area											681	197411	681	197411
Kirovohrad area									5	1009	335	90955	340	91964
Luhansk area									53	14613	239	38340	292	52953
Lviv area					2	362			4	2309	1239	263713	1245	266384
Mykolaiv area									16	8178	496	102745	512	110923
Odessa area			4	1258					107	49188	708	197958	819	247958
Poltava area									2	1214	630	128792	632	130006
Rivne area											637	152895	637	152895
Sumy area									10	1101	458	92215	468	93316
Terнопil area									1	7	759	106731	760	406738
Kharkiv area									107	46927	637	185196	744	232123
Kherson area									26	13381	409	92662	435	106043

⁹ The table only includes unilingual schools (Type I).

Areas (counties)	Distribution as per the language of education													
	Hungarian		Moldavian		Polish		Romanian		Russian		Ukrainian		Total	
	1	2	1	2	1	2	1	2	1	2	1	2	1	2
Khmelnysky area											724	130428	724	130428
Cherkasy area									3	1432	596	110314	599	111866
Chernivtsi area							68	12825	1	128	349	86639	418	86639
Chernihiv area									2	447	529	92796	531	93243
Kiev city											427	274889	427	274889

Source: У школах України навчання дітей здійснюється 6 мовами, - Міносвіти – ЦЕНЗОР-НЕТ, 24 01 2018.

In the academic year 2016-2017 altogether 655 schools were in operation in Subcarpathia: 649 state schools and 6 private ones. Of these 98 schools had Hungarian-language education: 66 state 5 private institutions.¹⁰ Further 27 schools had Hungarian-language classes. In the year under survey, altogether 157414 children attended school in Subcarpathia, of whom 16275 children studied in Hungarian (*Fedinec and Csernicskó* 2017a, 9; Інформаційний лист департаменту освіти і науки Закарпатської обласної державної адміністрації № 01-17/1971 від 17 07 2017).

Based on data from the Association of Subcarpathian Hungarian Teachers, in the school year 2017-2018 98 educational institutions had Hungarian-language education in Subcarpathia (types I and II). Altogether 16154 children attended these institutions¹¹ (Figures 6-7; Table X).

¹⁰ These latter are church-owned lyceums: the Nagydobrony Reformed Lyceum, the Nagyberég Reformed Lyceum, the Péterfalva Reformed Lyceum, the Karácsfalva Sztojka Sándor Greek Catholic Lyceum and the Munkács Saint Elisabeth Roman Catholic Lyceum.

¹¹ In Hungarian-language classes.

Figure 6: The number of Hungarian schools in Subcarpathia, 2017-2018

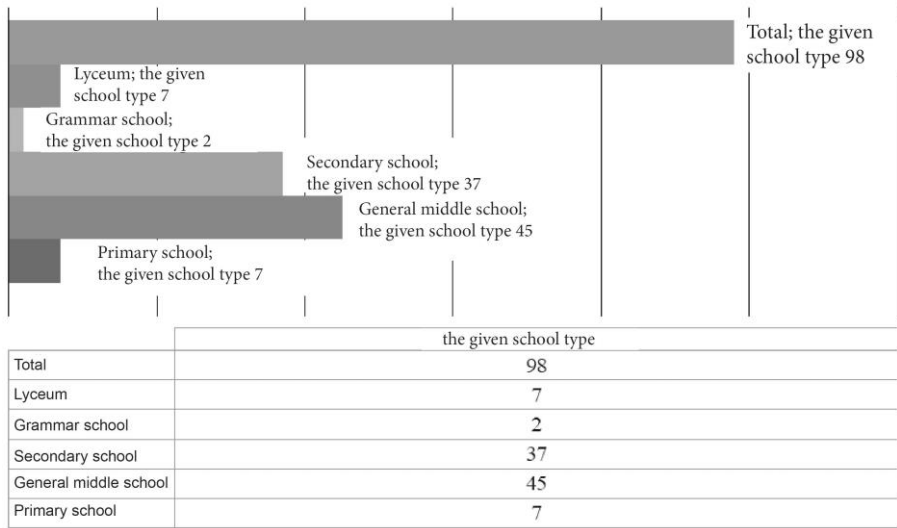


Figure 7: The distribution of Hungarian schools in Subcarpathia by language of education, 2017-2018

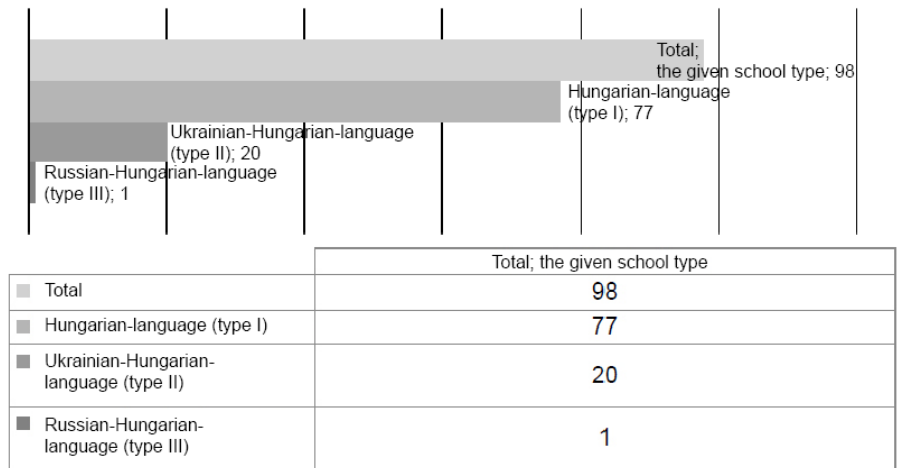


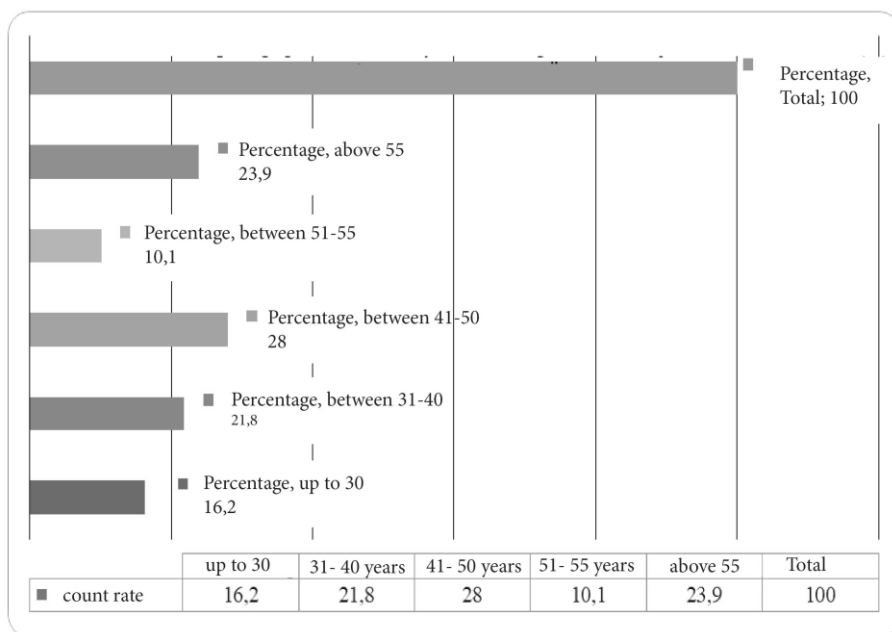
Table X: The distribution of Hungarian-language schools by administrative units in Subcarpathia, 2017-2018

Administrational units	General middle school	Primary school	Secondary school	Grammar school	Lyceum	Total
Total	7	45	37	2	7	98
Berehove township	1	19	9	1	2	32
Uzhorod township	2	8	7		1	18
Mukachevo township		5	2			7
Vinokhradiv township	4	6	8		2	20
Upper-Tisza-area		2	4		1	7
Berehove city		3	4			7
Uzhorod city			1	1		2
Mukachevo city		1	1		1	3
Chop city			1			1
Hust city		1				1

Source: Association of Subcarpathian Hungarian Teachers

In the academic year 2016-2017 441 thousand teachers worked in the institutions (Міністерство освіти і науки України; ОСВІТА В УКРАЇНИ, 2017) (Figure 8)

Figure 8: The distribution of teachers in Ukraine by age groups, 2016-2017



Source: *ОСВІТА В УКРАЇНІ, 2017*

In the school year 2018-2019 164 thousand students started their studies in 667 schools in Subcarpathia.

Yet, there is a significant lack of teachers observable in the county. Based on preliminary surveys, up to 347 teachers are absent from the floors of Subcarpathian schools. The greatest lack is measured in the townships inhabited by Hungarians: Vinokhradiv – 98 people, Uzhorod – 48 people, Berehovo – 42 people, Mukachevo – 21 people (перший.ком.ua; County Major Department of Education).

Higher education

In the academic year 2016-2017 657 higher educational institutions were in operation in Ukraine. Of these 370 institutions were granted accreditation at first and second stages,¹² while 287 at third and fourth stages¹³ (Державна служба статистики Україниб 2016).

In the school year under survey Ukrainian tertiary institutions had 1586754 students. In that year 313856 people enrolled in higher educational courses.

In the academic year 2017-2018 661 institutions had higher education (stages I-II: 372, stages III-IV: 289). In the first year, 313.8 thousand students started their studies (stages I-II: 60.6 thousand, stages III-IV: 253.2 thousand) (Державна служба статистики Україниб 2017).

In year 2017-2018 24786 people carried on their different studies in postgraduate doctoral courses, and 1646 people were preparing for their habilitation (Державна служба статистики Україниб 2017).

The following three categories need to be distinguished when discussing higher educational institutions (also) having Hungarian-language courses in Subcarpathia:

- A department of Hungarian Literature and Linguistics, a Hungarian Language Department or a department teaching the Hungarian language, too.
- An institution with courses completely in Hungarian.
- An institution with courses partly in Hungarian (*Ferenc* 2012, 22-23).

The great majority of Ukrainian higher educational courses with a Hungarian subject or in the Hungarian language operate as part of some state-owned institution, thus funding is performed accordingly.¹⁴ The Beregszász-based Rákóczi Ferenc II Subcarpathian Hungarian College, which is an institution acknowledged by the state (has stage III accreditation), but it was established and is operated by a foundation. A substantial proportion of the

¹² Higher educational institutions accredited in stage I are technical and vocational schools, and vocational secondary schools which grant a maturity qualification, too, in general. Stage II accredited higher educational institutions include colleges and other institutions.

¹³ Stages III and IV include, depending on the result of the accreditation process, colleges, universities, conservatories, academies. Universities all have stage IV certification.

¹⁴ State financing (partly with the subsidy of the Hungarian state).

financial support necessary for the maintenance of the institution is received by the Foundation for Subcarpathian Hungarian Colleges (KMFA) from sources in Hungary, which is supplemented by tender funds. Currently the Beregszász College, alone among institutions of higher education in Ukraine, receives normative funding in the framework of Hungary's programme for institutions of national significance (*Ferenc* 2012, 22-23; *Beregszászi, Csernicskó and Orosz* 2001, 54).

In Ukraine Rákóczi Ferenc II Subcarpathian Hungarian Teacher Training College is the only state-acknowledged, Hungarian-language, minority institution of higher education (Table XI). The college started its operation as a special, affiliated branch of the Nyíregyháza-based Bessenyei György Teacher Training College in 1994-ben, became independent in 1996, when it was granted its operating licence as Subcarpathian Hungarian Teacher Training College. The first class graduated in 2001. Since its establishment the institution has been continually broadening its choice of majors, courses and other forms of training, and in a relatively short period it has grown into a scientific centre of Subcarpathian Hungarians. On 11 December 2003 it assumed the name Rákóczi Ferenc II. From then on the name of the institution is officially Rákóczi Ferenc II Subcarpathian Hungarian College¹⁵ (*Matrunics* 2007; II.RFKMF – from the history of the college).

As per the licence issued by the Ministry of Education and Science, the following trainings are conducted at the college:

- 'molodshih specialist'¹⁶ in the following majors: 'Nursery School Pedagogy', 'Social Worker', 'Finance and Accounting', 'Tourism', 'Applied Mathematics'. Of these all five majors are accredited now.¹⁷

¹⁵ Units of the college: I. Departments – History and Social Studies, Pedagogy and Psychology, Philology (Hungarian Group, Ukrainian Group, English Group), Mathematics and IT, Biology and Chemistry, Geology and Tourism, Economics; II. Institute of Vocational Training (Tertiary Institute of Vocational Training of Rákóczi Ferenc II Subcarpathian Hungarian College); III. Adult Education Centre; IV. Research Centre (Lehoczky Tivadar Social Studies Research Centre, Hodinka Antal Linguistics Research Centre, Fodó István Research Centre); V. IT Centre (Puskás Tivadar IT Centre, Apáczai Csere János Library); VI. Department of Studies and Career Counselling; VII. Kölcsey Ferenc College; VIII. Department of Printing Press; IX. Fodó Sándor Cultural Centre (Révész Imre Gallery, Gross Arnold Gallery, Polónyi Katalin Textile Museum, Film Club).

¹⁶ Young professional (in tertiary vocational training).

¹⁷ At the Tertiary Institute of Vocational Training of Rákóczi Ferenc II Subcarpathian Hungarian College.

Table XI: Hungarian-language higher educational institutions in Ukraine (Subcarpathia)

Institution	Accreditation stage	Hungarian branch of a Ukrainian Institution	Affiliated Hungarian branch of a Ukrainian higher educational institution	A department of Hungarian Literature and Linguistics, a Hungarian Language Department or a Department teaching the Hungarian language	Independent Hungarian Institution	Affiliated Hungarian branch of a Hungarian higher educational institution
Rákóczi Ferenc II Subcarpathian Hungarian College	stage III				+	
Tertiary Institute of Vocational Training of Rákóczi Ferenc II Subcarpathian Hungarian College	stage II	+				
Beregszász Health Care College	stage II			+		
Ungvár Arts and Cultural College	stage II			+		
State University of Munkács, College of Humanities and Pedagogy	stage II	+				
State University of Ungvár, Ukrainian Hungarian Institute of Education and College	stage IV	+				
Kiev State University of Language	stage IV			+		

Károli Gáspár Reformed University						+
Saint Stephen University						+
University of Nyíregyháza						+
University of Debrecen						+
Sárospatak Reformed Academy of Theology						+
Saint Athanasius Greek Catholic College of Theology						+
University of Kaposvár ¹⁸						+

- 'bakalavra'¹⁹ (bachelor's) training can be found in the following majors: 'Nursery School Pedagogy', 'Primary School Teacher', 'History', 'Ukrainian Linguistics and Literature', 'Hungarian Linguistics and Literature', 'English Linguistics and Literature', 'Biology', 'Geography', 'Chemistry', 'Mathematics', 'Finance and Accounting', 'Tourism'. Of these nine majors are already accredited. They are planning to licence 'Chemistry', 'Tourism', and 'Finance and Accounting' in the academic year 2018/2019.
- 'mahistra'²⁰ training is performed in the following majors: 'Mathematics', 'History and Archaeology', 'Ukrainian Linguistics and Literature', 'Hungarian Linguistics and Literature', 'Biology'. Of these only one major, 'History and Archaeology', is accredited; the accreditation process of 'Ukrainian Linguistics and Literature', 'Hungarian Linguistics and Literature', and 'Biology' will take place in 2018/2019 (II.RFKMF).

¹⁸ Training of actors from 1 September 2019.

¹⁹ College training, BSc

²⁰ University master's training, MSc

Trainings in the non-accredited majors are performed as per curricula developed in cooperation with the following institutions: Saint Stephen University of Gödöllő (majors: Horticultural Engineering, Agricultural Engineering), Nyíregyháza College (majors: Economics and Management), Sárospatak Reformed Academy of Theology (majors: Catechist), Károli Gáspár Reformed University (majors: Hungarian as a Foreign Language, Mental Hygiene Specialist), University of Debrecen (majors: Nursing and Patient Care, Social Pedagogy). (II.RFKMF)

The supervisory body of II.RFKMF is Ukraine's Ministry of Education and Science.

Education at all levels is free of charge at the institution. Full-time students are granted a stipend as per the regulations of the Ukrainian State. The College provides all students with a stipend in accordance with their performance, and over 100 students receive social grants, which proves that the institution makes it possible for young people from disadvantaged families to attend higher education.

In the academic year 2017/2018 the headcount of students was 1210: 728 full-time students, 210 in correspondence courses. The number of people in non-accredited courses was 272 (II.RFKMF).

In late 2017/2018 102 graduates received their BA/BSc and Master's qualifications, and 92 people graduated as a 'young professional'.

Between 2001 and 2017 altogether 2794 students obtained their tertiary qualification at Rákóczi Ferenc II Subcarpathian Hungarian College. Of them 1010 became 'specialists', 1732 'bakalavra', 6 masters, 46 'young specialists'.

The total staff headcount in the academic year 2017-2018 was 187. This included 19 doctors of sciences (professors) and 68 Ph.D.s/candidates (II.RFKMF).

According to data from 1 September 2018 the academic year 2018-2019 was started with 1420 students at Rákóczi Ferenc II Subcarpathian Hungarian College in different forms of training. The students are taught by 127 full-time, 17 part-time, and 24 contracted tutors. Of these 18 have habilitated, 63 hold a candidate's or Ph.D. degree, 14 are professors, and 15 are assistant professors (II. RFKMF - <http://kmf.uz.ua/hu/orosz-ildiko-arakoczi-foiskola-rektoranak-tanevnyito-unnepi-beszede/>).

Adult education

In Ukraine one of the most urgent problems of adult education that needs solving is the task of establishing the network as well as developing the guidelines and management framework. The legal and political environment in the country has not made it possible to create the network of adult education, the current higher education sector in Ukraine is unsystematic, unorganised, spontaneous and ineffective. The elements of life-long learning, however, are already present in the form of adult trainings, trainings offered by different NGOs and in-house trainings in workplaces in operation in the framework of public education and higher education²¹ (Ádám 2010).

Legal environment:

There is no separate adult education law in Ukraine, adult education is only regulated in the framework of the law on education.

Chapter 18 of the framework law on education provides for adult education.²² The chapter consists of 11 articles.²³

²¹ II. vszeukrájinszkij zjazd pracivnyikiv oszviti, MONU, Kijiv, 2001, 212. (Second Comprehensive Ukrainian Conference of Pedagogues).

²² Стаття 18. Освіта дорослих (Chapter 18: Adult Education) – Act No. 2145-VIII on education passed on 5 September 2017, which entered into force on 28 September 2017. (<http://www.golos.com.ua/article294010>; Accessed: 14 October 2017)

²³ Including, among other things:

Article 1. The purpose of adult education, an organic part of life-long learning, is to ensure that adults can exercise their rights to receive continuous training, taking into account their personal needs.

Article 2. State organisations and local governments shall organise and secure the conditions for the formal and informal education of adults.

Article 3. Adult education involves: postgradual training; the professional training, retraining and further training of employees; continuous professional development and other trainings.

Article 4. In the framework of adult education the individual is entitled to freely choose the type and form of the educational institution or organisation, as well as the educational activity and other features thereof (programme, time, pace, etc.).

Article 5. Postgradual training involves the development of already obtained competencies, the obtaining of new ones based on any former practical, vocational and higher educational levels.

Article 6. Adult education involves: specialisation, retraining, professional further training and trainings.

Article 8. The principles of the professional training of employees are specified by the law.

Article 11. Educational institutions that carry out educational activity to develop employees' qualifications need to obtain a licence necessary for the given activity and /or have to have it certified by the appropriate bodies.

In addition to the framework law on education, the adult education scheme passed in 2011 discusses the regulation of the matter in detail (in 8 chapters and 29 articles), and currently the regulation of employees' professional further training appears in a few sector-specific laws related to education:

- Ukraine's law on general secondary education²⁴ (Закан України «Про загальну середню освіту» - Відомості Верховної Ради України (ВВР), 1999, № 28, ст.230) (Article 27: The professional further training and certification of teachers -Стаття 27. Атестація та підвищення кваліфікації педагогічних працівників);
- Ukraine's law on vocational training²⁵ (Закан України «Про професійно-технічну освіту» - Відомості Верховної Ради України (ВВР), 1998, № 32, ст. 215) (Chapter VIII, article 46: Training teachers in vocational schools and vocational institutions - Підготовка педагогічних працівників професійно-технічних навчальних закладів);
- Ukraine's law on higher education²⁶ (Закан України «Про вищу освіту» - Відомості Верховної Ради України (ВВР), 2014, № 37-38, ст.2004) (Article 4: The right to higher education - Стаття 4. Право на вищу освіту; Article 33: The system of institutions of higher education - Стаття 33. Структура закладу вищої освіти; Article 60: Postgradual training. Further training of teachers and researchers - Стаття 60. Післядипломна освіта, підвищення кваліфікації та стажування педагогічних і науково-педагогічних працівників);
- The regulation of higher education in Ukraine is dealt with in certain normative and legal documents (deeds, laws) such as:
- Ukraine's strategy of national education for 2012-2021 (Указом Президента України від 25 червня 2013 року № 344/2013 *України* «Про Національну стратегію розвитку освіти в Україні на період до 2021 року»);
- Ukraine's law on the professional development of employees (Закон України «Про професійний розвиток працівників» - від 5 липня 2012 року N 5067-VI) (Chapter I, article V: The role of trade unions,

²⁴ The new draft bill on 'general secondary education' is currently in progress.

²⁵ Under revision.

²⁶ Under revision.

professional NGOs and employers in the professional development of employees; Chapter II: The professional training of employees);

- Ukraine's law on the employment of the populace (Закан України «Про зайнятість населення» - Відомості Верховної Ради України (ВВР), 2013, № 24, ст.243) (Chapter V: Vocational orientation and training - Розділ V. Професійна орієнтація та професійне навчання);

At the initiative of the Ukrainian Ministry of Education and Science, on 13 September 2017 a legislative committee was created for 'the development of adult education'. The primary task of the committee was to initiate and prepare Ukraine's law on adult education. The committee included experts of the Ministry of Education and Science as well as professionals from DVV International's²⁷ Ukrainian branch and Ukraine's Adult Training Association, too. The recommendations related to the law (scheme) were submitted to the committee by 15 November 2017.

The Ministry of Education and Science, in order to continue the aforementioned work, appointed a committee with Minister's Decree No. 30 on 12 January²⁸ to develop Ukraine's adult education law. The work was shared with the experts of the Ministry, and different Ukrainian higher educational organisations and NGOs: altogether 40 people.²⁹

The law was drawn up by the committee and submitted for approval to the Ministry by 1 July 2018.

Funding:

The funding of postgraduate trainings in Ukraine is carried out from the state budget, primarily for the unemployed via the central financing of employment offices,³⁰ and is used for different professional further

²⁷ Ukrainian affiliated branch of the International Cooperative Institute of the German Adult Education Association.

²⁸ Наказ №30 від 12.01.2018 р. – Про утворення робочої групи з розроблення проекту закону України «Про освіту дорослих».

²⁹ Leader of the committee: Rakeshovich Yuri Mihailovich (Рашкевич Ю.М.) under secretary.

³⁰ Owing to lacking legal regulation.

trainings.³¹ For other target groups adult education is funded from tender sources, the support of foundations and minimally from private payments.³²

Subcarpathian Hungarian organisations that also deal with adult education realise their projects mainly from Hungarian tender funds, and to a lesser extent by Ukrainian tenders.³³

Institutions of adult education in Ukraine and Subcarpathia

In Ukraine there is no network of institutions of adult education, but the elements of life-long learning already appear in the form of different adult education programmes operating in the framework of public education and higher education.³⁴ Alongside the 17 ministries up to 70 state bodies (authorities) have their own educational institution(s) with accredited vocational and further trainings for different sectors:

1. **Employment centres**³⁵ - state institutions operating at county and township level.
2. **Institutions that undertake adult education activities, too** – They operate sporadically, primarily the adult education centres of universities and colleges, as well as institutions of Ukraine's Ministry of Education and Science³⁶.

³¹ Mainly for the financing of county teacher further training institutions. The Ukrainian state spends up to 0.1-1.5% of the budget, up to 0.8 billion hryvnya, allotted for teacher further training. The budgetary funds available to different sector ministries (e.g. health care, industry) are even smaller, which can be spent on professional further trainings (e.g. trainings for doctors and engineers).

³² The lack of efficient utilisation of tender funds slows down the development of the network of adult education even more.

³³ The number of Hungarian organisations which attempt to realise their professional activity from Ukrainian tender funds, mainly because the number of such tenders is extremely low, and also because applying in Ukrainian greatly delimits participation in tender calls and opportunities.

³⁴ Primarily adult education centres created in adult education institutions, as well as the few NGOs established in the past years.

³⁵ Professional retraining is carried out primarily for the unemployed. Each year up to 200 thousand unemployed people take part in some kind of retraining in Ukraine (*Liukyanova* 2017, 106.)

³⁶ Non-exhaustive list.

- **National Scientific Academy of Pedagogy**³⁷ (Національної Академіє педагогічних наук України)³⁸ – Operates as a centrally managed body related to the Ministry, including 11 accredited college-class institutions (also dealing with adult education):
 - *Institute of Pedagogy and Adult Education* (Інститут педагогічної освіти і освіти дорослих)³⁹ was established on 24 November 1993. It is an institution (college) with stage-III certification. Currently it has 4 scientific departments: 1) *Department of Andragogy* (Відділ андрагогіки); 2) *Department of the Theory and Practice of Education* (Відділ теорії і практики педпгогічної освіти); 3) *Department of International Education and Adult Education Systems* (Відділ зарубешних систем педагогічної освіти і освіти дорослих); 4) *Department of Work Psychology* (Відділ психології праці). Alongside the departments of primarily theoretical activity there are 5 scientific centres in operation at the institution, which perform practical training:
 - 1) UNESCO Department⁴⁰ (Кафедра Юнеско); 2) Further Education Centre (Центр підвищення кваліфікації); 3) Psychological Counselling and Training Centre (Психологічний консультативно-тренінговий центр); 4) Academy of Pedagogical Creative Work and the Teaching of Adult Training (Академія педагогічної майстерності та навчання дорослих); 5) Centre for Comparative Pedagogy (Центр порівняльної професійної педагогіки). The Further Training Centre organises professional further trainings for mainly tutors in Ukrainian higher educational institutions and the employees of different social and economic sectors in 29 subjects. The duration of the training courses is 72 hours.

³⁷ Created on 4 March 1992.

³⁸ The institute's website: <http://naps.gov.ua/>

³⁹ The institute's website: <http://ipood.com.ua/>

⁴⁰ Realises postgradual trainings.

The institute employs 83 researchers, including 3 academicians, 25 professors and 32 candidates. In the past five years the institute's colleagues have published 2000 scholarly works: 47 scholarly monographs (on adult education), 95 textbooks, 100 methodological guidelines, 62 scholarly articles (in periodicals of the highest impact factor).

In Ukraine and Subcarpathia only the Adult Education Centre of Rákóczi Ferenc II Subcarpathian Hungarian College and the Beregszász Branch of the Subcarpathian Teacher Further Training Institute conduct adult education trainings in Hungarian:

I. Adult Education Centre of Rákóczi Ferenc II Subcarpathian Hungarian College (Центр перед- та післядипломної освіти ЗУІ ім. Ракоці Ф. ІІ.)

– As per the decree passed by Rákóczi Ferenc II Subcarpathian Hungarian College in 2004, the Adult Education Centre was created as a subunit of the College. Initially they advertised language courses (English, Ukrainian, French, German, Hungarian as a foreign language)⁴¹ and courses to obtain an ECDL (computer user) licence, but today they conduct several different training courses: Secretary-Administrator, European Studies (2006-2007); Health Care and Social Assistant, Tourist Service Provider, and Project Management and Application (2008-2009);⁴² Waiter (the first OKJ course in Subcarpathia) (2010); Radio Anchor and Announcer (OKJ) (2011); Renewable Energy Advisor (2011); Beekeeping (2012); Tourist Service Provider (2013);⁴³ Rag Weaver;⁴⁴ Village Catering (2014-2015);⁴⁵ Tourist Guide (2017);⁴⁶ Plant Protection (2017).⁴⁷

The purpose of expanding the choice of trainings is to provide wide-ranging possibilities for those that wish to develop their knowledge as adults and to

⁴¹ Hungarian as a foreign language in 60 hours, the rest are language courses in 120 hours.

⁴² Courses organised jointly with Pannon Source Adult Education and Service Network in the Carpathian Basin.

⁴³ The 600-hour course was realised in a cooperation with the Association of Citizens for Tiszalök and 'GENIUS' Charitable Foundation.

⁴⁴ Under the ENPI Across Borders Cooperation Programme. The 180-hour course was closed with an exam.

⁴⁵ The project, implemented in cooperation with Túrr István Training and Research Centre and funded from EU support (HUSKROUA 1101/041) qualified as an OKJ training course in Hungary.

⁴⁶ A 360-hour course. It closed with an exam and granted an official tour guide licence.

⁴⁷ The education was carried out in 40 hours in cooperation with Saint Stephen University.

obtain or change a profession via their further training. The participants are at the same time involved in a cooperative teaching material and programme development scheme in the Carpathian Basin (*Ádám* 2010).

The personnel background of the Adult Education Centre depends on the number of trainings launched and the quantity of tenders won. Whereas in 2004 the institute started its operation with 5 employees, in 2010 already 46 tutors taught courses at the Adult Education Centre, and in 2017-2018 already 143 people, including 4 full-time employees (1 director, 2 administrators, 1 technician).

The Adult Education Centre does not receive any kind of state subsidy, thus it is self-sufficient. This means that they operate from tender funds, of which the most important today are the sources of the Bethlen Gábor Fund, but they make an effort to win transnational tenders, too.

The infrastructural background is provided by II. RFKMF. The office of the Adult Education Centre is next to the College's Office of Education.

Participation in the courses is not bound to age or previous qualifications. The number of graduates here is as follows: academic year 2005-2006: 190 students, academic year 2006-2007: 501 students, academic year 2007-2008: 417 students, academic year 2008-2009: 634 students, academic year 2009/2010: 404 students, academic year 2010-2011: 410 students, academic year 2011-2012: 313 students, academic year 2012-2013: 387 students, academic year 2013-2014: 180 students (*Ádám* 2010; II. RFKMF). In the academic year 2017-2018 9471 people enrolled in foreign language courses provided by the Adult Education Centre. The courses were held in 12 townships, 45 towns in 120 hours per each course with the employment of 139 tutors.⁴⁸ (II. RFKMF - Orosz Ildikó, a Rákóczi-főiskola rektorának tanévnyitó ünnepi beszéde [Celebratory talk opening the academic year by Ildikó Orosz, rector of Rákóczi College], Accessed: 16 09 2018 - <http://kmf.uz.ua/hu/orosz-ildiko-a-rakoczi-foiskola-rektoranak-tanevnyito-unnepi-beszede/>)

⁴⁸ Hungarian as a foreign language: 128 persons, Russian: 1 person, Ukrainian: 2 persons, English: 6 persons, German: 2 persons.

II. Beregszász Branch of the Subcarpathian Teacher Further Training Institute

(Філія у м. Берегово Закарпатського інституту післядипломної педагогічної освіти) – Professional training and further training are two of the great fields of adult education. The employees of educational institutions have to participate in professional further trainings every 5 years, which are organised by the regional and municipal teacher further training institutes in bigger cities.⁴⁹ Teacher further training institutions have stage-III (college) accreditation. The conditions of accreditation are defined by the ministry and the state. All institutions have to have at least 4-5 departments and 5-6 methodological cabinets. Some institutions have the possibility to launch candidate trainings in education,⁵⁰ if the personnel conditions are given and the training has been accredited. There is a teacher further training institute operating in each Ukrainian county. Their work is harmonised by the Institute of pedagogy and Adult Education operating within the *National Science Academy of Education* (Інститут педагогічної освіти і освіти дорослих).⁵¹ The institutions are without exception all state owned as these are the only ones that can organise state-approved teacher further trainings.⁵²

The teachers of primary, general, secondary, special pedagogical schools and nursery schools may apply for the further trainings organised by the institutes, and the further trainings organised by the departments of the institutes may involve the training of college and university tutors holding higher qualifications, too. The validity of the accredited teacher further training course is 5 years.

Teacher further trainings are free of charge, one has to pay only for the issue of the certificate (19 hryvny)⁵³ and for the accommodation (dormitory room). But after the further training the participants are reimbursed for their dormitory fees, the fare (single return ticket) and a minimum daily

⁴⁹ Primarily in towns with a county rank: e.g. Dnyepropetrovsk, Kiev, Harkov, Odessa, etc.

⁵⁰ Ph.D. training.

⁵¹ Also, to a lesser degree, the University of Educational Management, operating within the NPTA (Університет менеджменту освіти) and the College of IT and Educational Technology (Інститут інформаційних технологій і засобів навчання).

⁵² The bigger higher educational institutions (universities and national universities) can also operate teacher further training institutes if they have passed accreditation and obtained the necessary operating licences. There are, however, few such courses in Ukrainian universities.

⁵³ 190 HUF.

allowance. The teacher receives full salary for the time of the further training, and the substitute teachers are financed from the state budget⁵⁴.

The three-week courses organised by the teacher further training institutes are included in the process of professional certification (Orosz 2007, 14; Ádám 2010, 55-58; Beregszászi, Csernicskó and Orosz 2001, 20-28). The law on education, too, provides for professional certification (Act No. 2145-VIII on education passed on 5 September 2017, entered into force on 28 September 2017. Article 50: On the certification of teachers. Стаття 50. Атестація педагогічних працівників), according to which each teacher has to pass the certification – ‘attestation’ – process after certain predetermined periods⁵⁵ and as per a predetermined procedure. This means that the teacher’s work is qualified, and they are delegated to certain categories: young professional (fresh graduate), category II teacher, category I teacher, high-standard teacher. Besides the different categories of salary, different titles are granted, too: senior teacher (starshiy vchitely), methodician, methodological advisor (vchitely methodist), Ukraine’s honorary teacher (zasluzheniy vchitely Ukrayini), which defines the pay, too. As per the effective law, attestation is mandatory every 5 years, but one may request to undergo the certification procedure every 2 years, and young graduates can only request the procedure after spending three years in the profession. Professional certification is performed by a committee set up by the township’s educational office, which appoints a committee for each school (the member of the school committee include: the principal and vice principals, senior teachers, representatives of social organisations (chairman of the parents’ council, the mayor). The task of the committee is to inspect lessons in the number specified by the regulation, to survey whether the teachers know the given specific subject’s methodology, which the teachers report on before the committee. On the basis of the submitted material and personal experiences the committee makes a recommendation for the category, submits it to the township court, which makes the final decision (Orosz 2007, 14-15; Ádám 2010, 55-58; Beregszászi, Csernicskó and Orosz 2001, 20-28).

⁵⁴ Even though several townships do not cover this.

⁵⁵ Every 5 years.

There is no possibility to complete the teacher further training courses wholly in Hungarian in all subjects. In the courses organised by the Beregszász Branch of the Subcarpathian Teacher Further Training Institute the majority of lectures and seminars are held in Hungarian, and as of 2016 it has been possible to write and defend hand-in essays and presentations in Hungarian. The number of hours is as follows as per the principle of lecture/practice (e.g. further training of principals, vice principals, teacher-organisers 06-24 03 2017; further training in science subjects, 8-26 01 2018) at the Beregszász Branch of the Subcarpathian Teacher Further Training Institute (Table XII):

Table XII: Distribution of number of lessons for languages of education in the courses organised by the Beregszász Branch of the Subcarpathian Teacher Further Training Institute

Thematics	Obligatory number of lessons	Of this, in Hungarian
Further training of principals, vice principals, teacher-organisers, 6-24 03 2017		
General subjects	16	10
Special subjects	96	58
Practice	8	8
Total	120	76⁵⁶
Individual work	22	
Altogether	144	76
Further training in science subjects (Chemistry, Biology, Ecology, Physics, Maths), 8-26 01 2018		
General subjects	16	8
Special subjects	96	76
Practice	8	8
Total	120	92⁵⁷
Individual work	22	
Altogether	144	92

⁵⁶ 63%

⁵⁷ 77%

The Beregszász Branch of the Subcarpathian Teacher Further Training Institute offers day school and correspondence courses on school and nursery school management,⁵⁸ special subjects,⁵⁹ inclusive pedagogy for Subcarpathian national minority institutions (Hungarian, Romanian, Slovakian⁶⁰), as well as courses for school speech therapists and psychologists. The courses are ordered by the township/town's educational departments as needed.

In the academic year 2017-2018 584 teachers, nursery school teachers and school principals took part in the courses offered by the Beregszász Branch⁶¹ (Table XIII).

Table XIII: Training program of the Beregszász Branch for the academic year 2017-2018

	Courses	Number of groups	Number of participants (persons)
1.	Course on educational management for principals, vice principals and teacher-organisers	1	33
2.	Course for teachers of Hungarian Language and Literature	1	26
3.	Course for teachers of Ukrainian Language and Literature	2	50
4.	Course for teachers of English	1	31
5.	Course for lower primary school teachers	4	92
6.	Course for day care staff	1	25
7.	Course for Maths and IT teachers	1	25
8.	Science course (for Chemistry, Biology, Ecology, Physics teachers)	1	36

⁵⁸ For school principals, vice principals and nursery school management, primarily in the subject matters of educational management and organisational studies.

⁵⁹ For teachers and nursery school teachers, practically in all school subjects.

⁶⁰ For Romanian- and Slovakian-language schools there are only primary teacher training courses. In special subjects, for Romanian national minority schools the Csernovts County Teacher Further Training Institute provides appropriate courses. There are no Slovakian-language secondary schools in Subcarpathia (type 3, see page 10).

⁶¹ Based on data from the Beregszász Branch of the Subcarpathian Teacher Further Training Institute.

	Courses	Number of groups	Number of participants (persons)
9.	Course for History and Geography teachers	1	30
10.	Course for PE teachers	2	44
11.	Course for school librarians	1	32
12.	Course for club leaders	1	17
13.	Work safety	3	85
14.	Nursery school teachers' course	2	58
Total		22	584

The professional standard of the further training institutions is adequate. The professional work of the Beregszász Branch also includes, in addition to teacher further trainings, the organisation of methodological seminars for Hungarian-language educational institutions and of teachers' conferences.⁶² In the past six years (2013-2018) the Branch has organised 44 methodological seminars and 19 conferences, of which 11 were international ones (Table XIV).

Renowned Hungarian experts, lecturers, primarily the tutors of the Nyíregyháza University, the University of Debrecen, the Eötvös József University of Arts and Sciences and the Pedagogy Faculty of the Gál Ferenc College, often appear in events organised by the Beregszász Branch (seminars, conferences). On several occasions the lecturers of Sellye János University (Komárno) and the employees of the Komárno Adult Education Centre held lectures, too.

⁶² The Beregszász Branch performs the methodological inspection of the national minority schools in Subcarpathia.

Table XIV: International conferences organised by the Beregszász branch of the Subcarpathian Teacher Further Training Institute

	Theme of the conference	Date	Venue	Number of participants (persons)
1.	Project pedagogy – Its place in the process of education	17 05 2013	Beregszász (Berehovo)	60
2.	Motivational factors in the education of Roma students	23 10 2013	Beregszász	36
3.	‘Child-centred schools’ The theory and practice of project pedagogy	24 10 2014	Beregszász	54
4.	The lifestyle of Roma children, problems and opportunities of their education	27 03 2015	Beregszász	62
5.	A comprehensive analysis of the labour market effects of vocational education, current problems of vocational–technical education	24 04 2015	Makkosjányosi (Yanoshi)	108
6.	The possibilities and prospects of Ukrainian prostgradual trainings with respect to the EU integration efforts	28 10 2015	Ungvár (Uzhorod)	187
7.	Specificities of teacher training for national minorities (Hungarian, Slovakian, Romanian, Roma). Findings from Ukraine, Slovakia and Hungary	30 10 2015	Beregszász	42
8.	Modern educational institutions - Ukraine, Hungary (current situation, problems, perspectives)	15 04 2017	Beregszász	90
9.	‘Opportunities and prospects of teacher further trainings in Ukraine’ – on the 70th anniversary of the Subcarpathian Teacher Further Training Institute	10-11 11 2016	Ungvár-Beregszász	155
10.	Development of competencies in nursery school education	23-24 03 2018	Beregszász	111
11.	Education of Roma people in Subcarpathia (problems and possibilities)	10 04 2018	Beregszász	25

The professional work of the branch in this respect is assisted to a great extent by Rákóczi Ferenc II Subcarpathian Hungarian College (supplying rooms and accommodation, too), and the Subcarpathian Association of Hungarian Teachers.

NGOs in adult training – Since Ukraine's declaration of independence in 1991 the civil or 'third' sector has been developing at an extraordinary pace and gaining experience. Following the change of regime new solutions, new structures became possible and necessary. In 1992 the *law on the unification of citizens* (Закан України «Про громадянство України» - Відомості Верховної Ради України (ВВР), 1991, № 50, ст.701) was passed, after which the laws created in the mid-1990s further developed the legal framework of operating NGOs.⁶³ Organisations were set up to satisfy social, economic and cultural needs. Up to one third of these perform social, charitable and humanitarian activity, 16% of which deal with children and young people, and 9% with health care. The government does not provide these NGOs with direct financial support but concedes certain tax exemptions. The majority of their income derives from the financial sector. Foreign sources also play an important part in the upkeep of NGOs. In 1996 up to 1200 NGOs were registered by the Ukrainian Ministry of Justice, and their number has grown since (Jelentés a külhoni magyarság helyzetéről, 2008, 50). Currently there are 12 NGOs for 10 thousand citizens in Ukraine.

I. 'Ukrainian Adult Education Association' National Social Association (Українська Асоціація освіти дорослих⁶⁴) – *at the initiative of the National Scientific Academy of Pedagogy and 'Knowledge' Social Association the nationwide organisation was established on 13 May 2015. The main goal of the Association is to establish and develop the adult education network in Ukraine, promote life-long learning, and to establish international relationships. Beyond this, to coordinate and unify nongovernmental bodies managing education, consulting and methodological assistance.*⁶⁵ *The association included 35 legal entities nationwide in 2017: associations, foundations, and organisations dealing with education (Merzliakova, 24 June 2016). The Association is member of the European Adult Education Association (EAEA) as of 2016.*

⁶³ The law was amended several times, it has been in effect in its current form since 18 January 2001.

⁶⁴ In short in Ukrainian: УАОД.

⁶⁵ The website of the association: <http://www.uaod.org.ua/>

II. DVV International (Ukrainian affiliated branch of the International Cooperative Institute of the German Adult Education Association; Німецької асоціації народних університетів) – Launched adult education in Ukraine in 2010 as a primary duty, as one of the most efficient methods to attain sustainable development. The area of adult education is supported in three fields: 1) micro-level (educational institutions for adults); 2) middle level (establishing independent adult education schemes and networks); 3) macro-level (counselling services, sector policy and activities related to advocacy).

III. Hungarian NGOs in Subcarpathia – The Subcarpathian Hungarian community has several local and regional NGOs, which fully or partly deal with some form of adult education. A selection:

ADVANCE Subcarpathian Counselling and Development Centre (Едванс, Закарпатський центр розвитку та консультацій, благодійний фонд);

- Bioculture Association, Subcarpathia (Громадська організація спілка "Біокультура");
- Subcarpathian Development Society (Закарпатська компанія з розвитку);
- Subcarpathian Hungarian Association of Teachers (Закарпатське угорськомовне педагогічне товариство);
- Subcarpathian Hungarian Tourist Society (ГО "Закарпатська Туристична Угорська Спілка");
- Subcarpathian Association of Hungarian Entrepreneurs (Угорська асоціація субпідприємців Закарпаття);
- Komjáti Benedek Charitable Foundation (Благодійний фонд "Бенедикт Комьяті");
- Subcarpathian Society of Border Municipalities (Регіональна асоціація органів місцевого самоврядування "закарпаття");
- Subcarpathian Centre for the Development of Enterprises (Закарпатський Центр розвитку);
- Beregszász Tourist Information Centre (Туристичний інформаційний центр м. Берегово);
- Subcarpathian Teacher Further Training Institute, Beregszász Branch (Філія у м. Берегово Закарпатського інституту післядипломної педагогічної освіти);
- Rákóczi Ferenc II Subcarpathian Hungarian College, Centre for Adult Education (Центр перед- та післядипломної освіти ЗУІ ім. Ракоці Ф. ІІ.);

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SPECIFICITIES OF ADULT LEARNING, ADULT LEARNERS' MOTIVATION TO LEARN

Edina Márkus

The specifics of adult learning, adult learners' motivation for learning

Background for the research¹

The precondition of the success of adult learning is to know the students' motivation and their interests. This is what the training content, forms of learning and curricular and extracurricular contents can be adjusted to and developed. There are precedents of research into the specific features of adult learners; several domestic and international studies deal with the activation of adult learners, their motivations and the barriers that hinder their learning.

Terminology

Taking a look at Hungarian professional literature, the research of learning motivation appears both in a theoretical and practical perspective. Analyses of the definition, the process and the background of learning motivation appear, among others, in Kozéki (1975), Csoma (2002), Réthyné (2003) and Zrinszky (2005).

There is no international consensus on the definition of adult and adulthood, so the term must be approached from different perspectives. The participant of life-long learning is a definitive term in the study of adult education, which Knowles investigates from the aspect of education, social roles and psychological maturity. He believes that if individuals deem themselves responsible for their own learning, they can be regarded as adults from a training perspective (1980). According to Zrinszky, an adult learner is a citizen that is older than the school-leaving age (which differs from country to country) and undertakes to develop their competencies, knowledge or skills of their own accord or due to some extrinsic motivation. This is undertaken by the individual in addition to working in a job or due to the lack of an occupation (Zrinszky 2005). Naturally, learning appears in adults' life in connection to different scenes and life situations.

¹ The chapter was authored by Edina Márkus.

This is pending social relations, financial possibilities, the support of the family, intrinsic motivation, availability and routine. The definition of adulthood is diverse, each subculture and society has their own definition. According to Zrinszky, adulthood is a complex of different attributes: social age, psychic age, biochemical physiological age as well as moral maturity (Zrinszky 2005).

When defining learning in adulthood we must differentiate between formal, non-formal and informal training and education, taking into account the intention of adults to learn, their reasons for doing so and their goals set. Their reasons may be professional advancement, development of some skills, self-actualisation or simply learning as a pastime activity. Adult learning can have several components, and its success requires all criteria to be met. As soon as any of them is missing – for instance, time or financial expenditures – learning can be maintained only with great effort (Mihály 2003). It is often not possible for adults to learn in a formal and organised way, and there is need for self-regulated learning processes. The person motivates themselves, organises and structures their own learning process as well as controls and contextualises their studies. In this process the individual takes into account their own skills and acts accordingly, and is able to articulate their own personal goals (Réthyné 2003).

Motivation and learning motivation are briefly mentioned in the closing chapter, as a theoretical framework, so in this study I will be focussing on the findings of the research.

The term 'motive' (in psychology) derives from Latin and means 'to move'. It is an intrinsic factor, which selects, triggers and energises a type of behaviour as per the current status and environmental conditions of the given organisation. Beside this, the specificities (characteristics) of a motive are determined by the quality and status of the organisation's needs and the environmental conditions (an umbrella term for target objects, etc.). Motives can be fundamental, biological or hereditary and they can be acquired, learned throughout the individual's life (Nagy 1978, 172). Motivation is, on the one hand, a system of motives, which together determine some definite behaviour, action; on the other hand, it is a psychological umbrella term, which contains all the different motives. Motivations in human beings are so complex as to be almost impossible to unravel (Nagy 1978, 171)

So that we can define learning motivation succinctly, it is practical to examine the two terms independently. This is where Sándor Nagy's and Endréné Réthy's definitions come handy, as they introduced a clear and widespread term.

According to Nagy (1981, 53), learning in school is indeed a process of erudition: the transformation/self-transformation of the person through the processing of knowledge, the assimilation of the basic goods of modern social culture as actively as possible, the amalgamation of thinking and acting. In Nagy's specially pedagogical approach (1983, 5), the definition of learning includes the following: learning data; learning operations that ensure the application of data; learning different practical activities (psychomotor skills); learning the requirements (forms) of thinking; learning social attitudes and behavioural norms accepted by society.

In Réthy's definition (1988, 62), learning is a form and purpose of satisfying the need to learn, a manner of acquiring knowledge, which is realised in different types of behaviours, and the system of the learning activity itself. The basic condition of productive learning is motivation. Ideally the motivation launching the process is permanently present throughout the entire process, and thus there is no need for continuous stimulation before each task. Motivation is a fluctuating and ever-changing impact. Motivation is important throughout the entire learning process. It is not enough to raise the individual's interest, but it must be present during further acquisition.

The learning motive is a group of motives driving the individual to the learning activity, launching the learning activity and being created during learning, motivating the learner to continue the activity. These motives are directed at the entirety or parts of a learning programme (Csoma 2002, 528; Réthy 1989).

According to Réthy (1988, 64), learning motivation is based on a highly organised cognitive and effective system of the interaction of learner and environment. Therefore, learning motivational processes are interpreted as an interaction between learner and their environment regulated in a complex way. Learning motivation is an intrinsic tension driving the individual to perform the learning activity, which is shaped in the relationship between learner and school requirements. Learning motivation

is a kind of intrinsic tension that regulates the entire learning activity. Learning motivation is created in the interaction of intrinsic and extrinsic drives, in the interaction of learner and environment. It is dependent upon the situation and can be regarded as acquirable, as it is in continuous flux due to special experience. The sum of the relationship between learning and motivation is that without motivation there is no learning (Réthyné 2003).

Kósáné and her colleagues differentiate between two basic types of motivation: intrinsic and extrinsic. Intrinsic motivation is an inherent drive which appears in every learning activity, and it surfaces in the attention to and curiosity about the subject. The other type of motivation is secondary (extrinsic) motivation, an external drive that is generally independent of the object of the action. These can be praise, a reward, some kind of interest or a fear of punishment. Learning has both types of motivation, but it is intrinsic motivation that contributes to a stable and productive learning process (Kósáné, Porkoláb and Ritoókné 1984).

Réthyné's works from the late 1980s differentiate between three, then in 2003 between four, types of motivation from a pedagogical perspective:

1. Internalised, intrinsic learning motivation is a socialisation process that is active throughout the individual's life from infancy to old age. Internalised motives are drives that are attached to the character in the individual's value system, such as duty, morals, integrity and conscience. In this case learning motivation is reinforced by positive results and weakened by failures.
2. The starting point of intrinsic learning motivation is a task, an activity, the curiosity about or interest in the task. The task itself becomes the drive, the learner strives to acquire knowledge to get satisfaction.
3. Extrinsic learning motivation is independent of internal drives (such as interest, curiosity, conscience, morals) and appears through some external impact. Extrinsic motivation is created by the need for social rewards (a good mark, the teacher's praise) or in fear of negative consequences (punishment). Factors of external motivation are less permanent, since we make fewer efforts to obtain a reward than to obtain satisfaction. Extrinsic motivation is the most useful when the individual is not at all motivated to do the activity.

4. Prestige motivation is situated in between intrinsic and extrinsic motivations. The learner is motivated by self-actualisation and external competition, primarily in long-term activities, which have quick results (Réthyné 2003).

Based on research conducted in institutionalised adult education Csoma (2002) divides the motives that launch learning into three greater groups:

- Existential motives. Existential interests are naturally connected to several other motives, and are rather diverse in themselves.
- Another group is constituted by prestige motives: a chance or goal of mobilisation, the improvement of living conditions, requirements of the workplace the individual has to meet – these are all very important for the inclination to learn.
- The third group includes interest obtained through earlier educational activities and the desire to learn.

The three groups of motives listed above are not connected to the motivation of education and learning, but have to do with the motives of undertaking long-term, well-defined learning in a closed system. The Hungarian and international surveys that led to the categorisation analysed further education in school-based adult education. The three groups of motives appear in the studies not by themselves but intertwined with one another. The motivational basis of individual people may include an entire system of motives, and may have several motives from the aforementioned groups mixing together (Csoma 2002, 78)

Sz. Molnár (2009) bases her view on Boshier's idea and highlights the following categories of motivating factors for adults:

- 'Seeking social relationships': When learning in groups, there is the possibility to establish new relationships and potential friendships.
- 'Seeking social motivation': Solitude, friendlessness and boredom, etc. can all be triggers of learning, since human beings are sentient and need everyday connections with the outside world.
- 'Professional advancement': A major motive. The workplace plays a key role in the life of the individual and their families. Obtaining a job, holding down a job and promotion can all necessitate learning.

- 'Community work': learning may be developed as a result of helping others.
- 'Extrinsic requirements': Non-voluntary learning does exist. Learning induced by familial or professional pressure has the danger of the learning process being diminished or stopped altogether due to some difficulty.
- 'The desire to know': One of the main types of motivation is learning for the sake of learning, as it is based on curiosity and the wish to obtain information and knowledge.

According to Zrinszky (2005) and Maróti (2005, 213), no matter what motive might trigger adult learning, its prevalence and productivity are defined by the extent the adult learner is able to mobilise their emotions, thinking, intention and action for the sake of achieving the goals of learning. Extrinsic and intrinsic motivational factors, personal experience, a personal learning history, a personal learning strategy and the factors related to the processing of information (e.g. conscious reasoning, recollection) all have a central role to play here.

According to Kocsis, the efficiency of adult learning depends upon the inherent operational organisation of its components, those that are 'exposed to the attrition of age' and those that are 'stable', their efficacy and their capacity to counterbalance the defective operation of other factors. Of these defining factors motivation has special significance, showing the person's interest in learning, their inherent dedication to a higher standard, their inclination and commitment. It is influential in priming the person to learning and counterbalancing the negative impact of skills that become more and more rigid with age (Kocsis 2006, 114).

In Bábosik and Bábosik's view, motivation presents an impact contrary to frustration, as it allows the individual to actualise their needs instead of delimiting them. Motivation is nothing else but the integration of the individual's existing needs in the given activity. Integration here means allowing these needs free rein in the activity, thus making the activity attractive for the learner and thus making the learner interested in the activity's formative and developmental impact. If one does the opposite, one can expect negative results. This is owing to the fact that the frustration of an already existing need has a negative impact on a new or

more important need. For instance, there is a continuous sense of failure and this affects the learner's interest and desire to learn negatively, which declines or for a period ceases to be (Bábosik and Bábosik 2006, 106).

In our study we attempt to disclose the motives of adult learners involved in the research in relation to the motive groups established by Csoma.

Researches in the field

We have found several empirical studies of the topic, which generally target the drives behind the learning process of a specific age group, training level or field, e.g. language acquisition: cf. Dörnyei (1996), Török (2006), Györgyi (2002), Kerülő (2008, 2009, 2010), Engler (2014). Several Hungarian students of motivation focus not on learning motivation, but on the characteristics of adult learners, yet motivational factors must be taken into account in order to define adult learning. The next subchapter presents such researches.

The research entitled 'Learning motives of adults', led by Kerülő (2006), was conducted in February 2005 with correspondence cultural manager majors from the College of Nyíregyháza. 388 questionnaires were completed with 450 students.

The aim of the study was to learn about learning motives characterising the students as well as the factors and reasons that assist or inhibit learning. The gender distribution of the respondents was 74% women and 26% men. With regard to age, three quarters were younger than 35 years. With respect to their employment status 83% were actively employed.

The survey shows that the students place the motives of learning primarily in the world of work. They deem it most important that the energy invested in learning should have its result in their future job. Furthermore, learning activity is motivated by the will to preserve their position (44%): learning is regarded as a stabilising factor by people above 35, and 40% hope for a higher position and 16% for a new job. According to the study, the primary factors that maintain the learning process include the feeling of success (e.g.: extrinsic reward, a good mark), self-confidence and interest. As opposed to this, factors hindering learning are mainly related to existential factors such as a lack of confidence, a sense of failure, overly high

expectations, unrealistic goals and time pressure (related to the workplace and family). Learning is made especially difficult if the tutor does not regard the learner as an adult, not taking into account their families and workplaces. Adult learners are also confronted with the difficulty of the workplace many times hindering their progress. For instance, they are not allowed to go to exams, consultations, or on a leave to prepare for the exam. 80% of the students' workplaces have a negative opinion about their college studies. Some learners therefore keep it a secret.

In summary, the research findings help the institutions learn about and try to satisfy demands for trainings. Satisfied learners can be the best advertising gimmick any given institution can have. The study also reveals a sort of change in perspective where learners do not tie learning to a specific age any longer (Kerülő 2006).

The main goal of Török's (2008) research titled 'Adult learning on the basis of a Hungarian representative survey' is not to define the motivations of adult learners, but rather to disclose their motivations to correctly define adult learning. This is why he analysed these motivations specifically and ranked them. The aim of the research was to learn about the learning activity of the adult population. He differentiated between factors that encourage, or motivate and those that hinder, or obstruct learning. The survey examined 1200 persons older than 18 in December 2005. In the research it was found that adults' learning activity is greatly influenced by the favourable effect of the results on their life situations, labour market status and financial standing. Based on this, the majority of adults learn of their own volition only if they know that the result of their learning will be their employment, promotion and earning more money. Another motivating factor, according to half of the respondents, is when they think that their qualification might be devalued and become outdated. Yet, many of them (41%) believe that the effort made to study is not recovered, so they have no strong enough motivation to learn. As per the survey, the most important learning motive is the fear of losing their job. In reality this is a forced behaviour, and may lead to a sense of failure when they for some reason become unemployed despite their studies. In this case most people feel it was no use learning a lot, and they are discouraged from life-long learning. Instead of this main motivational factor people should learn for the reason to get a higher position and find newer and better jobs or

improve their self-esteem. The research shows that there is a stratum of society (10-15%) which resists to and proves to be passive in the face of learning. These people's learning motivation could be enhanced by showing them the opportunities in learning and acquired knowledge. It should be highlighted that time spent learning is worthwhile and improves the standard of living by all means. According to many of the respondents (42%) it would be easier to integrate people in adult education, and participation would be higher, if people could organise and schedule their own learning, and the training hours were more flexible. Many people wish to choose the pace at which to learn (32.2%) and the method of learning (25.8%). The survey throws light on an increasingly current problem. The fast-paced progress of ICT divides learners. There are some who have a computer, internet access, a CD player at home, and there are those who do not. This contrast is sharp enough and results in severe problems. It is exactly those that cannot make use of the advantages of technological development that are difficult to bring back to learning and keep there, as most already dropped out when they were children. The great majority are still disadvantaged due to their low qualifications, and they have no chance to use the internet, or download auxiliary materials. So today they have a much more difficult job with learning, as education is more and more closely adjusted to the use of new technologies (CDs, computers, the internet). Due to this, such a social stratum is much harder to bring back to learning, they are not easy to motivate, since many feel as if they cannot learn anything or do the assigned tasks, while others who have access to these technologies in their homes get ahead. In conclusion, the study shows that the main learning motive in adulthood is the fear of losing one's job.

Fehérvári (2000) in his research titled 'Findings of a students' survey' analysed participants of trainings outside the school system. The research analysed learning motivation, too. The research was conducted by the Institute of Educational Research in 1998, with the participation of 25 training institutions in 5 settlements, via questionnaires. 701 questionnaires were completed, and the courses randomly selected in the given institutions. For the purposes of our research the part on the learning motivation of participants is useful and lends itself to processing. The survey showed that the students' motivation derived from four main

reasons to participate in the trainings: the extension of professional knowledge, the hope for a new job, interest in the profession, and acquiring a certificate. These reasons were analysed by factor analysis, which yielded five main motives. For the factor 'they need the certificate' they had responses such as 'for the certificate', 'they were forced to enrol'. The second factor was the extension of professional knowledge. The third was career building: the participants were motivated by the hope for a better job and promotion. The fourth motive was 'the company enrolled them' or 'they do not have a trade yet'. The fifth motive includes people willing to start a business or expand their professional knowledge. The analysis shows that the changed factors are in close connection with the students' school qualifications: those with lower qualifications focussed mainly on acquiring a certificate and a trade, while those with higher educational qualifications concentrated on career building and promotion when choosing their training course. Skilled labourers were generally motivated by starting a venture. The research tells us that despite much talk about an oversupply in the training market, the students' response is contrary. One third of their number was forced to choose the course they participate in, since no similar courses were launched in their vicinity or they had no information about such. Several people enrolled in the given training course because it was financially supported to a great extent.

In summary, just like in several other surveys examining learning motivation, the most characteristic motive here is the fear of losing one's job as well as the hope for a better position and higher salary. These factors usually motivate the learning of people with lower qualifications. University graduates are motivated by acquiring new and interesting knowledge, expanding their professional know-how and vertical mobility in the workplace. Other parts of the research tell us that the learning process of 51.7% of the participants was financed partly or fully by employment centres. So the subsidies to be required at the employment centres is a strong motivating factor, as people with mainly disadvantaged backgrounds could not finance their own training, so they probably would not enrol in them, even though they need education the most.

Motivation research abroad. One of the studies under survey here is OECD's research programme (Mihály 2003), the subject matter of which is, in a nutshell, the learning of adults. The programme was decided upon in January 1996, with the cooperation of the ministers of education. Then in October 1997 the ministers of labour also joined the study. Note that in 1998 there was a conference held on 'How Adults Learn?' with the cooperation of the United States Ministry of Education. Finally, alongside the aforementioned ministries, the ministry of occupation, labour and social welfare joined in, too. Jointly they launched the comparative study on adult learning. The study was voluntary for the countries. The applicants included: Denmark, Finland, Norway, Spain, Portugal, Canada, Sweden, Switzerland and the United Kingdom. The survey was conducted by 27 experts, members of the OECD secretariat. The research started in June 1999 and ended in November 2001. It is important to note that by November 2001 the entire comparative analysis had been completed. During the research there were problems with the meaning of the term 'adult', as various countries attribute different contents to this term (e.g. Denmark – a difference in age). Responding to the question why adults learn the survey had the following results: 1. It is a requirement in the workplace to enrol in a professional training or retraining course 2. A demand for trainings at 'second chance' schools (training and educating young adult drop-outs) 3. Achieving a higher salary by completing a training course 4. The workplace does not provide the same appropriate training courses as are regular features at 'bigger' companies 5. As an immigrant learning is inevitable since in this way they have a better chance of getting a job 6. Due to some disadvantage the person wishes to work at a special workplace. As per another finding of the study related to motivation, the higher the school qualification, the more probable that the person learns something as an adult. But if one has lower qualifications, then they are less probable to start learning again as an adult. Along with that another tendency was disclosed by the experts: adults' willingness to learn depends on their occupation and the size of their salary. More 'white-collar' workers than 'blue-collar' workers learn as adults. Moreover, of 'blue-collar' workers it is only those with higher qualifications who started learning in their adult years. Another evident finding has to do with salaries: those that have higher qualifications 'go back to school' as an

adult, too, but those that earn lower salaries have less inclination to do so. But even if they do, they do it for earning more money. Motivating adults to learn. Professionals expect the following areas to make adults more motivated to learn: 1. Making higher education training mandatory or at least making them into a mandatory foundation for further studies. 2. Raising awareness of the mandatory nature of learning 3. In some form everyone has to take part in the system of LLL 4. With the help of the media people who need learning must be addressed 5. Creating training courses where learning is gamified (making people love learning) 6. Ensuring that people finish the trainings they have started. 7. The workplace must adjust to employee trainings 8. Popularising and ensuring e-learning, etc.

Another international study was published by UNESCO's Institute for Lifelong Learning containing interviews with adult learners on their careers entitled *I did it my way* (Martinez, 2005). The interviews were collected by the participants of the International Adult Learners' Week. It was translated into Hungarian in 2005. The collection has multiple purposes. It may help many adult learners who were forced to give up learning due to different emerging difficulties. This work serves as motivation for adults already learning something but also for those that are only thinking about learning. The publication presents a model and may provide teachers, tutors and institutions with assistance by depicting learners' attitudes to learning, their difficulties, thus helping professionals to get closer to the world of adult learners. The interviews were made in 14 European countries.

The book presents 27 careers. Its success is due to the subjects talking about their many times shocking life stories and their encounter with adult learning openly, without any taboos. Since the collection is about adults, we may learn about their primary experience with learning, their motivations, failures and successes. The interviews are strongly motivating, as they show life paths that became fleshed out and successful owing to learning. Summary and assessment of the interviews. Most interviewees first had very negative experience in the field of learning. Most of them were drop-outs. Due to their environment and disadvantaged situation many had not completed even primary school. In some interviews the learners talk about positive experiences in school as a child.

They have degrees. Since graduates conducted their studies in a former regime, many had to face the changes in society and the regime, due to which their knowledge proved outdated, and their workplaces of over ten years had been annulled or transformed. Some people had to give up their studies at a young age due to different learning difficulties (e.g. dyslexia) or bodily disabilities. Adult education provided them with opportunities with which they could again become 'sovereign' members of society. Regarding their qualifications, the sample is rather heterogeneous. Half of the respondents have some kind of qualification and the other half have none at all. The primary motivational factor is the hope of getting an appropriate job. This is emphatic in the case of those that dropped out of school early on. They encountered the problem of not being employed without any qualifications only later on. In most European countries learners like this can catch up in time. Many learn a trade or get a school-leaving certificate after learning the basics, then go on to college or university. The interviewees include many people that have learnt a trade and had a job in connection to it, yet some unforeseen event made them unemployed (e.g. illness, the termination of a workplace).

There are some interviews in which adults start learning as a hobby – mainly after retirement –, or due to some psychological crisis. The main motivation here is not prestige, but to find some recreational activities and to socialise. All interviews include the growth in self-esteem and confidence through learning. This is important because many people who become unemployed feel they do not count anymore and picture themselves on the periphery of society. Learning and the knowledge obtained increase self-esteem and self-confidence, and thus incite the setting of new goals and tasks and attempts at being employed. Interestingly in some cases the main learning motive was for adults to become role models for their own children. They felt ashamed at not being able to even check their children's homework. By finishing their studies they wanted to provide an example to their children: that learning and knowledge accompany one's adult life, and they are inevitable. In all interviews teachers are described as supportive and helpful. This was very motivating for the students. They were loyal and according to many respondents, if their tutors had not been so patient and helpful, they would have given it up. Another motivating factor was a strong group cohesion.

The trainings were a scene for the encounter of many similar life paths, and as a result these people could form really intimate relationships. The participants in individual groups and classes helped and encouraged one another. In many cases the financial subsidies available in schools, training courses and local governments were motivating. Many people could not work alongside their studies so without the subsidies they would have ceased to learn. Those students that studied along with working in a job were encouraged by the tolerance in their workplace. Another important incentive was family and the narrower environment who assisted students with their supportive attitude. Some people could also find employment after finishing their studies. In many cases students did not stop learning, several of them went on to colleges and universities, and some to other courses. All of them benefitted from learning. They talked positively about their adult student years. They believed many great opportunities awaited those who learn.

Methods of the research

We carried out a qualitative survey via questionnaires with a questionnaire of our design. The questionnaire is available in the appendix. With the help of SPSS software we analysed the data and performed analyses with single and multiple variables.

The subjects of the study are adult learners from Hungary and the partner countries. An adult learner is a person who at the time of the survey or in the 12 months before had been learning in adult education (adult education activity). The international surveys, e.g. EUROSTAT Adult Learning Statistics employ 12-month (AES – Adult Education Survey) or 4-month (Labour Force Survey (LFS) periods. These studies the proportion of participants are compared in a breakdown by EU member states and the above time frames. In our case it was not participation counts that mattered but we based our research on the 12-month period because we wanted the respondents to have relatively current experiences of adult learning.

The interviewees are all adults in contractual relationships with our partner institutions. Our sample is not representative but rather a reach sample; still it suits our purpose of learning about the characteristics of adults' learning in the framework of organisations. Our findings would provide our partners with useful information for designing their future activities.

In the survey we examined types of learning motivation and barriers. We focussed on the forms, methods, venues of adult learning, adult learners' needs and the practical use of teaching material. We investigated the background indices (gender, age, school qualification, country, settlement size) influencing these, the ways of using knowledge and skills acquired during adult learning (in the family, in the workplace and local communities); the trainings' potential or real impact on labour market inclusion, on income, health, and social and political participation.

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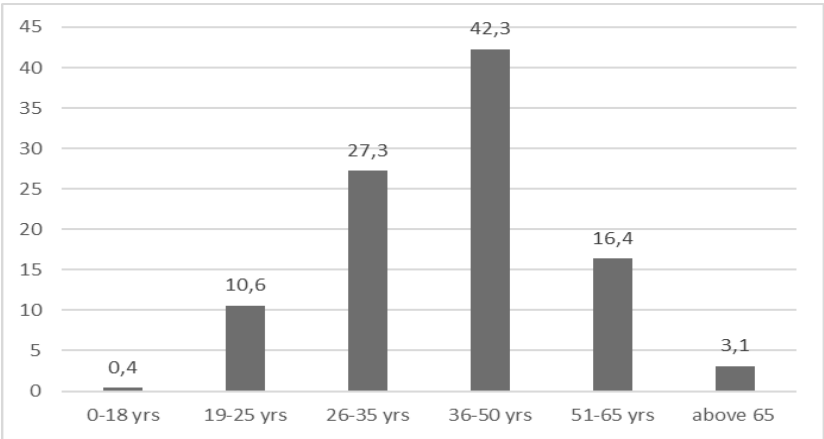
Findings of the research on the learning motivation of adult learners¹

This essay investigates the data disclosed in the research in accordance with the main topics in the questionnaire in addition to the characterising of respondents, with special emphasis on characteristics of adult learning and learning motivation, the methodology of adult learning (tools and techniques of learning) and the circumstances of adult learning (educational institutions, financing).

The major specifics of respondents

In view of the basic data from the respondents, the following can be established: the majority of the respondents, 449 of 577 (80.6%) are women, and there are 108 men (19.4%). Looking at the distribution by age (Fig. 1), over 40% of the respondents are between 36 and 50 years of age.

Figure 1: Distribution of the respondents by age (n=556)



¹ The chapter was authored by Edina Márkus and Ibolya Juhász-Nagy.

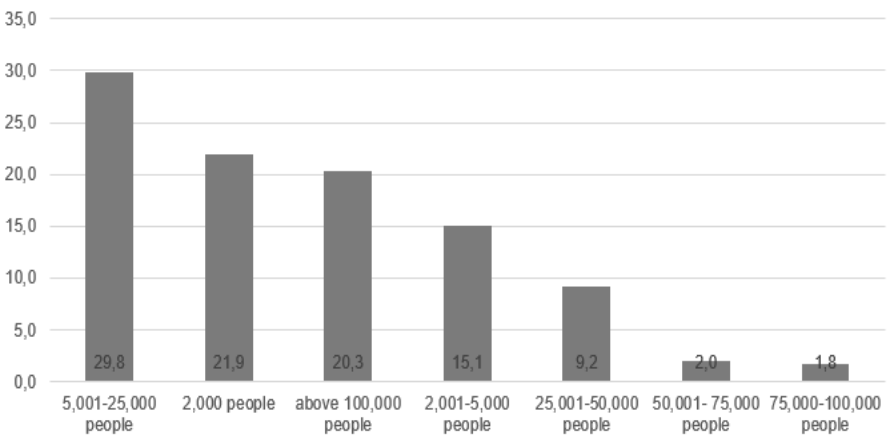
Regarding country of residence, 39.5% of the respondents live in Hungary, 23.5% in Romania, 19% in Slovakia and 17.6% in Ukraine (0.4% of respondents marked the UK as their place of residence, see Fig. 2).

Figure 2: Distribution of the respondents by country of residence (%)



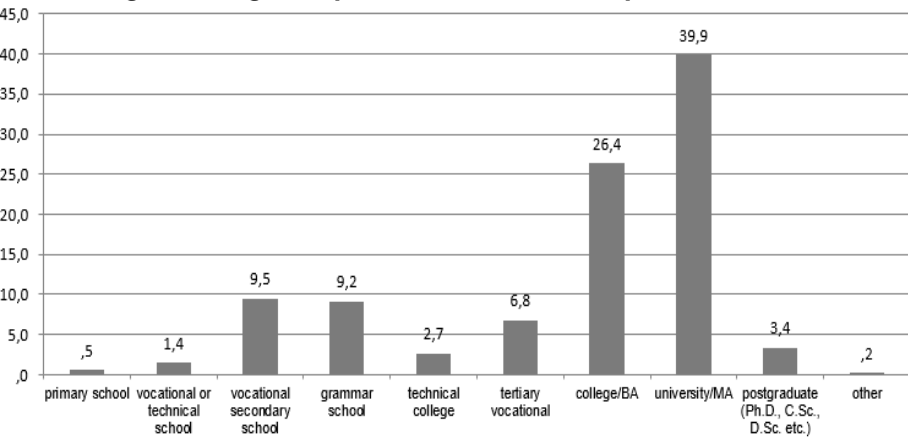
Looking at the size of the place of residence, we may establish that most of the respondents come from settlements with populations between 5,001-25,000 (29.8%), but the proportion of respondents from settlements with populations below 2000 and above 100,000 is also substantial (fig. 3). Therefore, there is a relative majority of respondents from small towns.

Figure 3: Populations of the places of residence of the respondents, % (n=557)



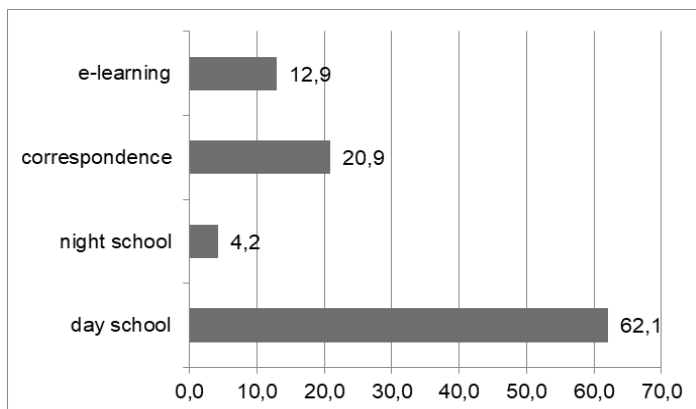
With regard to respondents' school qualifications, the majority are university graduates, which may have an impact on learning motivation and methods, so we have taken that into account in connection to the questions on the area (figure 4).

Figure 4: Highest qualifications of the respondents, %



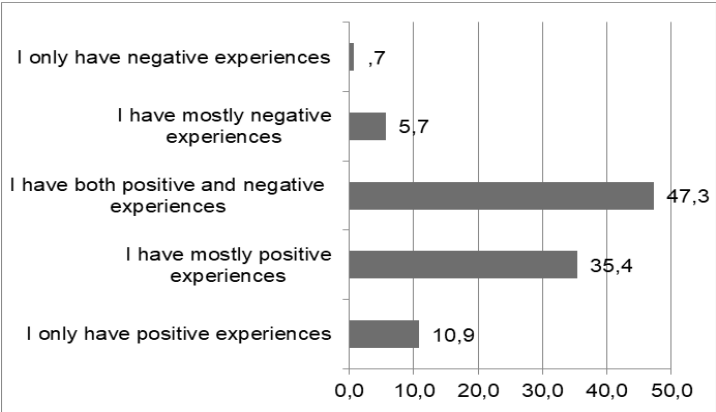
We asked the respondents what course they attended and where they obtained their highest school qualifications. Nearly 40% did not attend full-time courses but correspondence ones, so presumably they did so as adults. This is important because they might have some idea of the motives of, barriers to, methods of adult learning, which are of central significance to our study.

Figure 5: Manner of obtaining highest school qualifications - course, % (n=551)



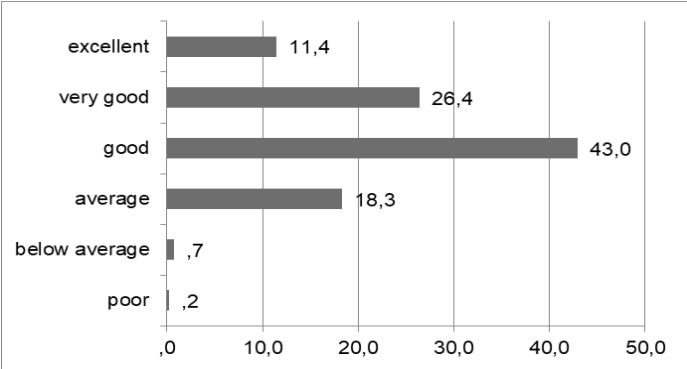
We were curious to see how the respondents evaluated their school careers from the perspective of success. The results (Figure 6) show that approximately half of the respondents amassed mostly positive or only positive experiences; in addition, there are also positive and negative experiences, which are represented by 47.3% of the respondents. Based on this, we can establish that primary experiences play an important role when choosing adult learning, and these people have some positive learning experience during their schoolyears. This is presumably a precondition of starting learning as an adult.

Figure 6: Success during schoolyears, % (n=543)



We also asked them about their productivity as students, what they thought of their own achievements, and this even more highlights the importance of preliminary experience. 80% of the respondents indicated their achievements as having been good, very good or excellent (Fig. 7). So, primary success at school may promote adults’ learning motivation.

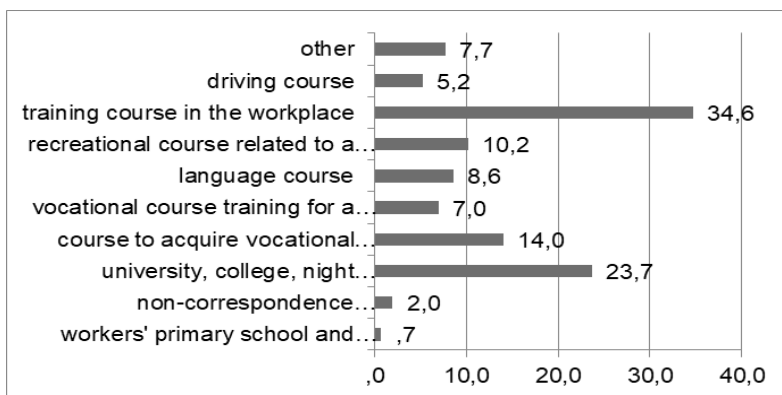
Figure 7: How well did you do in school in your opinion? % (n=542)



Findings on the specific characteristics of adult training courses and learning motivation

In the case of the question on the character of the training, for the overwhelming majority of the respondents enrolled in courses learning was mainly connected to their jobs or directed at obtaining professional qualifications or a tertiary qualification in their trade (Fig. 8).

Figure 8: Distribution by latest adult training course attended, %



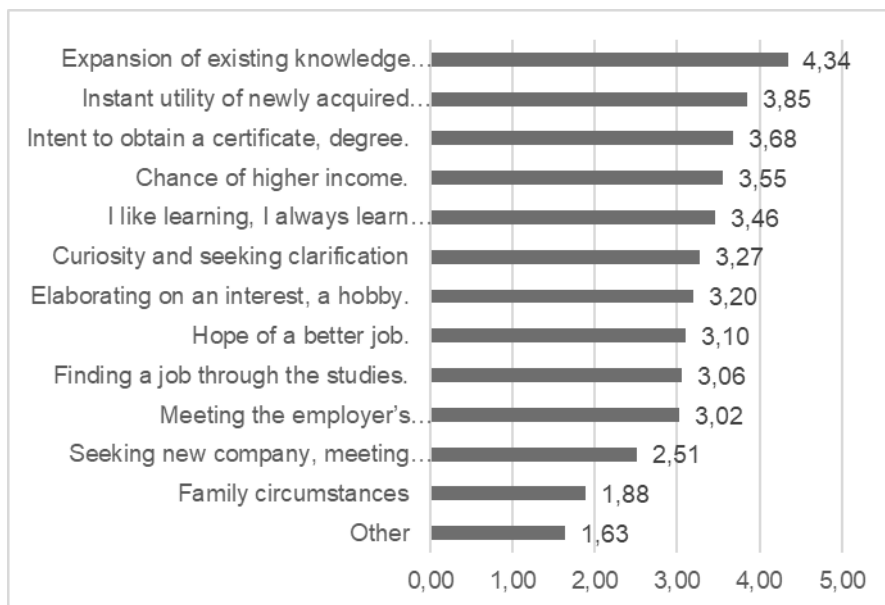
Examining differences between countries on the basis of the type of adult education, we may see that differences are not substantial. In all countries the first place is taken by trainings in the workplace followed by tertiary trainings, then in Hungary, Ukraine and Slovakia there are training courses providing professional qualifications, and in Romania we can see recreational courses. In addition, there are language courses and courses for filling a specific position.

Table 1: Type of latest adult training by country

	Hungary	Romania	Slovakia	Ukraine
Courses in the workplace	63	47	32	51
University or college night school, correspondence or e-learning courses	47	37	24	24
Official trainings providing professional qualifications	35	10	17	14
Recreational courses related to hobbies	19	16	11	11
Language courses	18	5	17	8
Vocational courses for a specific job	11	11	11	6
Driving courses	6	6	4	12
Non-full-time courses in vocational schools and vocational secondary schools	7	1	2	1
Workers' primary schools and grammar schools	2	2	0	0
Other	16	5	6	16

We asked the respondents about the reasons for enrolling in adult education courses. Figure 9 below shows the means of statements, where adult education goals were evaluated on a scale from 1 to 5 (1 – least true, 5 – most true). As can be seen, the list is dominated by the expansion of knowledge and skills, then comes obtaining applicable knowledge, followed by obtaining a certificate.

**Figure 9: The purpose of starting an adult education course
(1 – least true, 5 – most true)**



In order to collate the variables, we carried out factor analysis, by which we managed to differentiate between 3 separate factors in the statements on learning goals (Table 2).

The first factor includes responses which were defined by existential motives, the second group includes motives based on interest, while the third includes goals based on prestige and utilisable knowledge. These perfectly correspond to the Csoma typology. Based on his research on institutionalised adult education, Csoma (2002) divides motives commencing learning into three main groups. Existential drives. Existential needs, of course, go together with a series of different motives, and are quite differentiated in themselves. Another group of motives is constituted by prestige motives such as a chance of mobilisation, better living conditions, the requirements of the job, which are all very important for the development of the willingness to learn. The third group of motives includes the interest and willingness to learn developed during former education.

Table 2: Factors of the goals of adult learning

	existential motives	interest-based motives	motives related to prestige and utilisable knowledge
Hope of a better job	.875	,047	,083
Finding a job through the new studies	.852	,078	,057
Due to family circumstances	.571	,271	,038
Elaborating on an interest, a hobby	.163	,745	-,033
Curiosity, seeking clarification	.013	,716	,150
Seeking a new company, meeting new people	.364	,680	-,135
I like learning, I always learn something	-.095	,678	,270
Expanding existing knowledge and skills	-.128	,369	,645
Instant utility of acquired knowledge and information	.075	,260	,575
Chance of a higher income	.551	-,075	,560

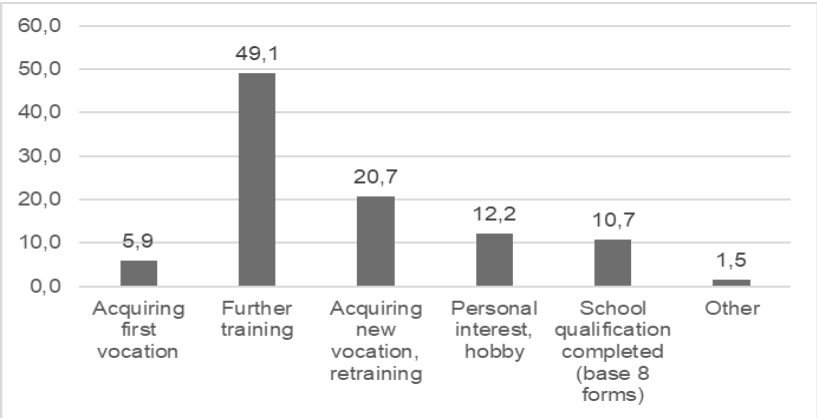
Looking at adult learning goals by countries (Table 3), we see that means differ in certain cases, for instance, in the interest motive (curiosity, seeking clarification) for Hungarian and Romanian respondents, and in the existential motive (hope of a better job) for Hungarian and Slovakian respondents. Also, Ukrainian respondents have marked slightly lower in each response for almost all motives, which shows a slightly more negative attitude to adult learning.

Table 3: The purpose of starting an adult education course by country (means)

	Hungary	Romania	Slovakia	Ukraine
Expanding existing knowledge and skills	4,35	4,38	4,36	4,24
Instant utility of acquired knowledge and information	4	3,75	3,98	3,53
The intention of obtaining a certificate	3,84	4,03	3,44	3,11
Chance of a higher income	3,7	3,51	3,7	3,12
I like learning, I always learn something	3,53	3,64	3,32	3,21
Curiosity, seeking clarification	3,49	3,47	3,06	2,72
Elaborating on an interest, a hobby	3,26	3,52	3,1	2,74
Hope of a better job	3,34	2,75	3,52	2,61
Finding a job through the new studies	3,25	2,97	3,17	2,63
Meeting employers' requirements	3,13	2,63	3,26	3,09
Seeking a new company, meeting new people	2,57	2,53	2,45	2,39
Due to family circumstances	2,04	1,89	1,82	1,59
Other	1,72	1,5	1,62	0

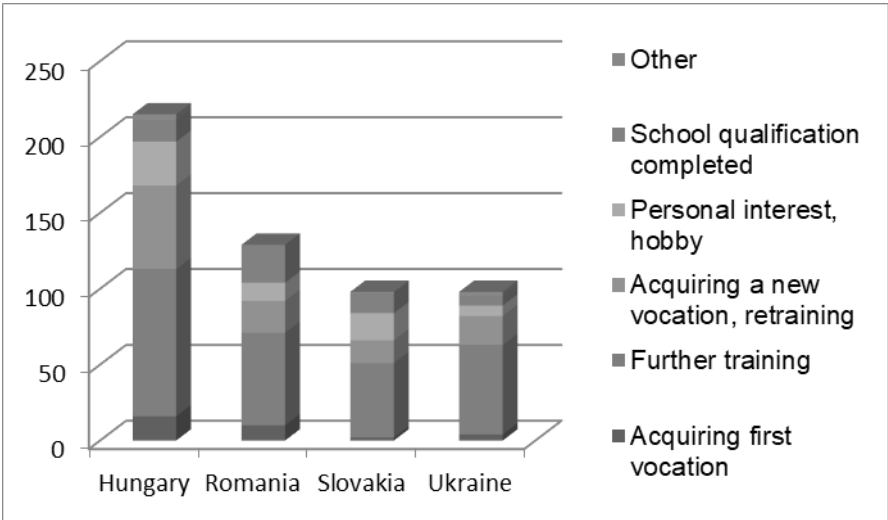
Figure 10 shows us that approaching the problem from the perspective of the direct goal of learning the main target is further training, as nearly half of our respondents start learning as adults. Another defining goal is obtaining a new trade as well as participation in retraining.

Figure 10: The goal of learning, % (N=542)



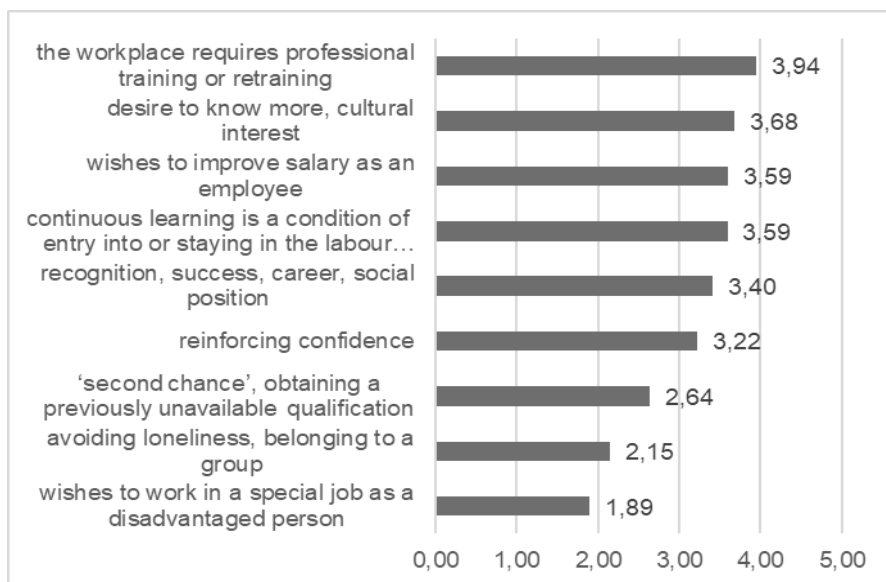
There are no substantial differences between countries, as the responses for all respondents of the given country are dominated by further training (Figure 11).

Figure 11: The (direct) goal of learning (pc)



We also asked our respondents what they thought the general purpose of learning was (generally speaking, about non-personal motivations). We found that the workplace is an extrinsic motivating factor, but in second place there was the will to know and cultural interest (Figure 12).

**Figure 12: What is the general purpose of adults' learning?
(1 – least true, 5 – most true)**



Comparing general motivation and personal motivation (data from Figure 9) we may establish that the means are higher for the personal question, but preferences are similar.

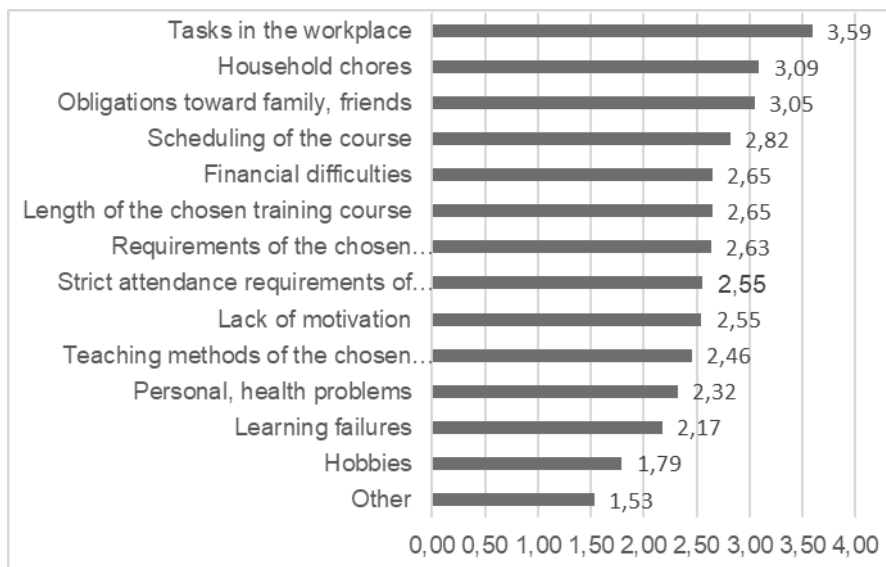
In an analysis by countries, there are no substantial deviations, in certain cases the values differ for Ukraine, but not significantly.

**Table 4: What is the general purpose of adults' learning?
(1 – least true, 5 – most true) (means)**

	Country			
	Hungary	Romania	Slovakia	Ukraine
'Second chance', obtaining a level of qualification that was not available formerly	2,65	2,81	2,90	2,10
The workplace requires professional training or retraining	3,95	3,73	3,81	4,32
The goal is recognition, success, career, social position	3,54	3,38	3,49	3,02
The goal is entry into or remaining in the labour market	3,92	3,57	3,65	2,83
Wishes to improve salary as an employee	3,78	3,40	3,64	3,40
Building self-confidence	3,19	3,33	3,29	3,09
The will to know, cultural interest	3,75	3,71	3,57	3,59
Special jobs as disadvantaged people	1,97	2,02	2,01	1,47
Avoiding loneliness and belonging to a group	2,29	2,05	2,32	1,84

We were curious about the factors hindering learning, too. This question may aid adult educational partner organisations in focussing their training courses. How can training courses be made more successful, how can learning be more productive for adults? The responses show that in the background there are mainly extrinsic factors related to the workplace and family, while intrinsic, individual barriers are less typical. The organisational practice of the institutions organising the training appear as moderate barriers (Fig. 13).

**Figure 13: To what extent do individual factors hinder learning?
(1 – least true, 5 – most true)**



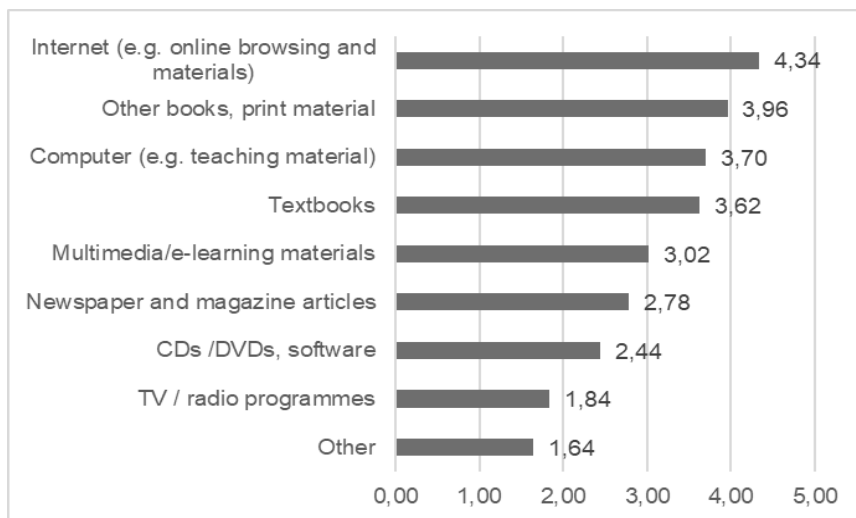
In order to collate the variables, we carried out factor analysis, by which we differentiated between 3 conspicuous factors in relation to learning difficulties (Table 5): the barriers connected to institutional organisation, individual intrinsic factors and extrinsic factors are clearly separate.

Table 5: Learning difficulties – factor analysis

	barriers related to institutional organisation	individual, primarily intrinsic barriers	individual, primarily extrinsic barriers
Requirements of the chosen course	,822	,276	,048
Length of the chosen course	,814	,178	,088
Schedule of the chosen course	,810	,114	,124
Strict roster at the chosen course	,787	,271	,094
Teaching methods of the chosen course	,698	,353	-,012
Learning failures	,215	,775	-,082
Personal, health problems	,167	,688	,081
Financial difficulties	,133	,681	,237
Lack of motivation	,384	,641	-,065
Responsibilities towards family and friends	-,022	,132	,841
Household chores	,036	,166	,833
Duties in the workplace	,173	-,043	,629

Questions about the methodology of adult learning (tools, learning techniques and methods)

We asked the respondents what tools they used characteristically during learning. They marked the individual tools 1-5. The most characteristic was the use of the Internet, but books, computers and textbooks also appeared at a mean value of over 3.5 (Fig. 14)

Figure 14: Tools of adult learning (1 – least true, 5 – most true)

The items of tool use show three marked factors: IT devices, electronic devices (radio, TV, CDs, DVDs) and traditional tools (Table 6).

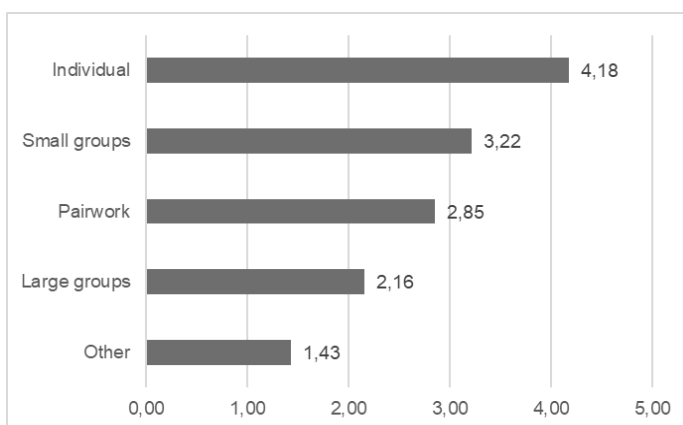
Table 6: Tools of adult learning

	IT devices	electronic platforms	traditional tools
The Internet (e.g. browsing online and online materials)	,825	,031	,185
Computers (e.g. teaching software)	,782	,167	-,031
Multimedia/ e-learning materials	,573	,176	,041
TV/ radio programmes	,085	,894	,059
CDs/DVDs, software	,334	,739	,094
Newspaper and journal articles	,077	,509	,479
Textbooks	-,026	,093	,808
Other books and print material	,165	,060	,790

Interestingly, age had no defining role in the choice of tools, young people do not characteristically use more IT devices.

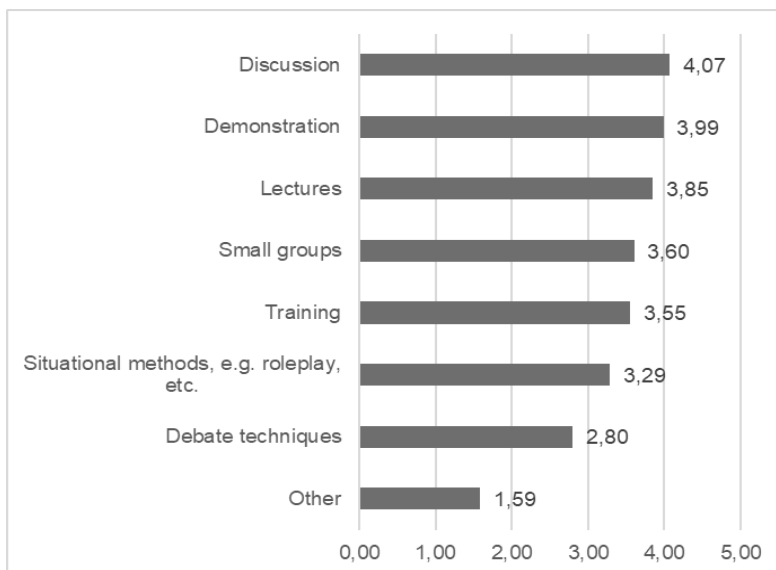
We also wanted to know how the respondents liked to learn from the perspective of organisational matters, and individual learning was marked very highly. This might be due to the fact that adults are limited by their circumstances, but also to the fact that the secondary educational system socialises its participants in this way.

Figure 15: How do you like to study with respect to organisational matters? (1 – least true, 5 – most true)



With regard to teaching methods the highest mean was allotted to a participant-based system, discussion (Fig. 16), in which adults' previous life and professional experiences and primary knowledge can be used. However, this is followed by demonstration and presentations, which primarily focus on the teacher. Activating methods (group work, training, situational methods) came only after these. Adult education professionals have the popular presumption that adults prefer participant-based, activating methods. This was not clearly seen in the responses. This may be due to various different factors; on the one hand, the type of new content designed for adult learning processes (some contents, theoretical and new information can be more productively taught by teacher-based, frontal methods), and on the other, any previous experience of the given methods.

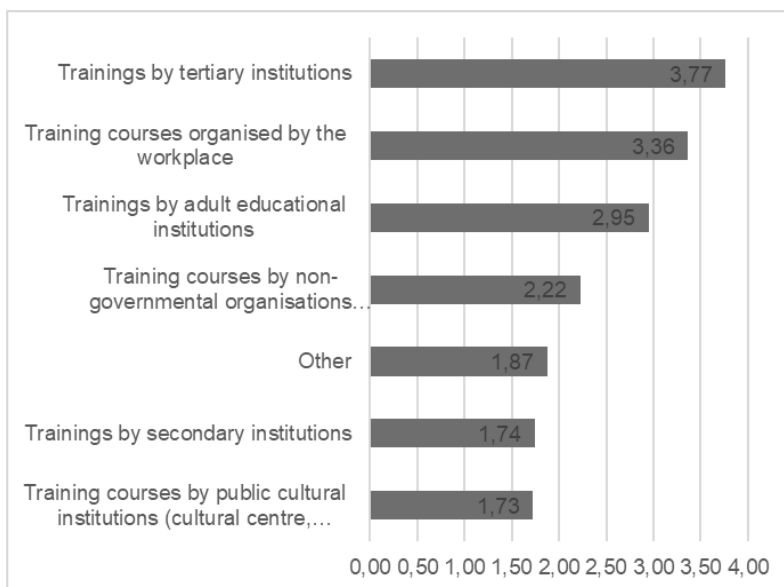
Figure 16: What teaching methods do you prefer to use when learning? (1 – least true, 5 – most true)



Findings of questions about the circumstances of adult learning

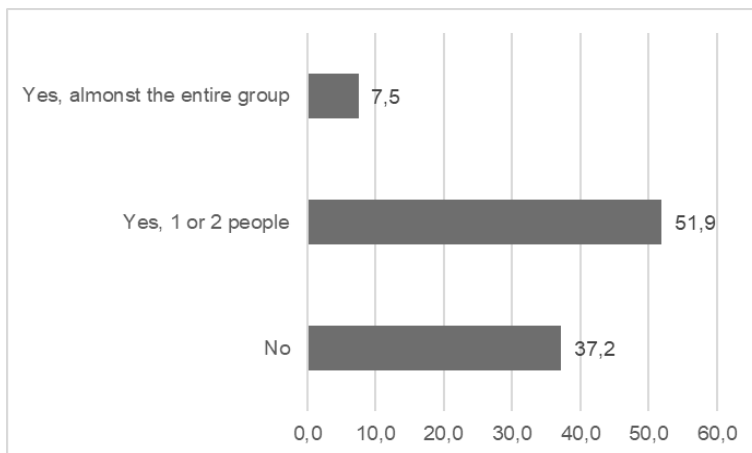
Our adult respondents characteristically utilise higher educational institutions and training courses organised by the workplaces, as seen in Figure 17. This is, of course, true of our respondents, that is, the adult learners reached by the partner organisations.

**Figure 17: Institutions utilised during adult learning
(1 – least true, 5 – most true)**



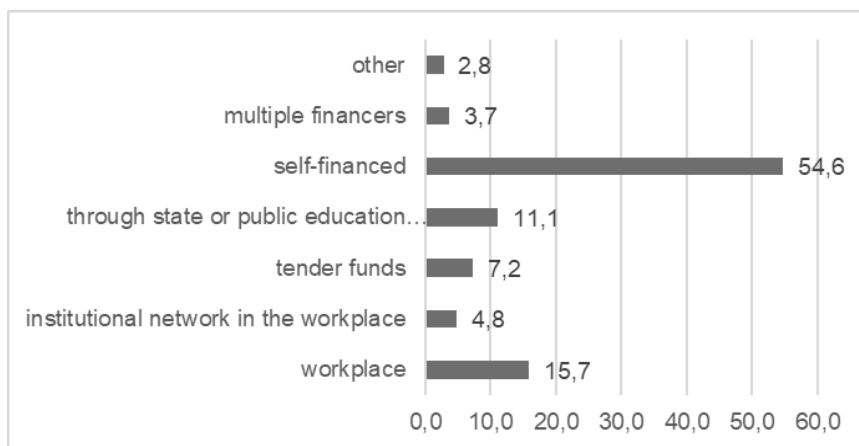
Over half of the respondents already knew 1 or 2 people in their training groups, which suggests that adult learners start learning due to one another's encouragement and personal relationships (Fig. 18). Based on this it is worth utilising informal channels and personal contacts when organising an adult training course and recruiting learners for them.

Figure 18: Number of acquaintances in the group before the course, % (N=538)



Over half of the respondents finance their training courses by themselves, and other supporters appear to a lesser extent such as the workplace and the state (Fig. 19).

Figure 19: Financing of the training courses, % (N=540)



Summary

In our research the respondents were adults in a relationship with our partner institutions, which is a reach sample and not a representative one, but it was sufficient to achieve our goal, that is, to learn about the characteristics of adult learning of adults in the scope of the organisations. Our partners received useful information from the research findings to use when planning their future activities.

No country-specific characteristics were found, and potential differences were only observable in some cases, e.g. the type of adult training, and the purpose of starting learning as an adult.

The background variables were not definitive either, so we presumed that school qualifications and age could influence the findings, but these, too, were not determining in relation to the individual motivations and barriers to adult learning and the choice of method.

The findings prove that the majority of the respondents sought out pragmatic opportunities for learning related to and useful for work and making a living, but also befitting their personal interest and fulfilling their desire to know more. Financial structures primarily included the workplace and own funding. Presumably if there were any subsidised training courses, then adults could participate in the training courses in greater numbers. In addition, the barriers are telling: the hindering factors are the workplace and family obligations. These show that we need to raise the awareness of and increase the motivation of employers with respect to trainings for adults.

Another important finding was that a substantial part of the respondents study individually, so tools assisting individual learning might be practical to be developed for them if we wish to support their learning (textbooks, interactive materials, video tutorials, mobile apps, etc.), alongside participant-based methods e.g. discussion as well as traditional frontal methods such as demonstration and presentation.

A lot of respondents already knew some people from their training groups, which suggests that informal relationships are a great way to contact applicants. Along with the modern tools of recruiting personal relationships still have an important role.

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APPENDICES

Questionnaire about the specifics of adult learning and motivation

General questions

1. Sex

1. male 2. female

2. Year of birth?

.....

3. Place of residence (settlement):.....

4. Mark one of the following categories with regard to the population of your place of residence.

1. 1-2.000 people
2. 2,001-5,000 people
3. 5,001-25,000 people
4. 25,001-50,000 people
5. 50,001- 75,000 people
6. 75,000-100,000 people
7. over 100,000 people

5. What is your current marital status?

1. married
2. in a relationship
3. widowed
4. unmarried, single
5. divorced, separated

6. What is your father's highest school qualification? (*Mark only one, the highest please*)

1. did not finish primary school
2. primary school
3. vocational or technical school
4. vocational secondary school
5. grammar school
6. technical college
7. tertiary vocational training
8. college/BA
9. university/MA
10. postgraduate (Ph.D., C.Sc., D.Sc. stb.)
11. other:

7. What is your mother's highest school qualification? (*Mark only one, the highest please*)

1. did not finish primary school
2. primary school
3. vocational or technical school
4. vocational secondary school
5. grammar school
6. technical college
7. tertiary vocational training
8. college/BA
9. university/MA
10. postgraduate (Ph.D., C.Sc., D.Sc. stb.)
11. other:

8. What is your highest school qualification? (*Mark only one, the highest please*)

1. did not finish primary school
2. primary school
3. vocational or technical school
4. vocational secondary school
5. grammar school

6. technical college
7. tertiary vocational training
8. college/BA
9. university/MA
10. postgraduate (Ph.D., C.Sc., D.Sc. stb.)
11. other:

9. What year did you obtain your highest school qualification?

.....

10. In what course did you obtain your highest school qualification?

1. day/full-time
2. night school
3. correspondence
4. e-learning

11. Do you currently attend any school-based training?

1. no
2. primary
3. vocational
4. vocational secondary (forms 9-12)
5. grammar school
6. tertiary vocational

12. In the past one year (12 months) how many times have you participated in an organised training course outside day school (apart from this one)?

*Please consider the following: **night school, correspondence, e-learning, vocational training, company training, language, driving, recreational and other courses**, in which you have participated **for even a day** during this period, irrespective of the fact whether you have completed them.*

0. I have not participated in any training
1. I have participated on occasions

13. What kind of adult training did you participate in last or do you participate in currently (apart from this one)? Several responses are possible!

Please consider the past 12 months, including the last training and course commenced.

1. workers' primary school or grammar school
2. non-day-school vocational secondary, vocational, providing official vocational qualification
3. university or college night-school, correspondence or e-learning
4. course providing official vocational qualification
5. vocational course training for a certain job
6. language course
7. recreational course connected to a hobby
8. course in the workplace
9. driving course
10. other:

14. What is your current occupation with an income?

A. I have no occupation with an income because:

1. I am a student

14/1. Where do you attend?

1. primary school
2. vocational school
3. secondary school
4. higher education
5. other:

2. housewife

3. on maternity leave

4. unemployed

14/2. How long have you spent...? months

5. on sick leave /sickness benefit

6. on disability benefit

7. as an old age pensioner

8. other:

B. I have an occupation with an income

1. part-time
2. full-time

14/3. Occupation:

14/4. Position:

1. unskilled worker
2. skilled worker
3. technical worker
4. supervisor, technician
5. white-collar worker
6. middle management
7. senior management
8. entrepreneur
9. other:

15. Is there a private venture in your household?

1. yes
2. no

16. How many jobs have you had (including the current one)?

1. I have not had a job yet
2. 1 job, but currently I am unemployed
3. 1 job, the current one
4. 2-5 jobs
5. 6 or more jobs

Questions about adult learning

1. What was your goal when you started learning as an adult?

(1 – least true; 2 – less true; 3 - neutral; 4 – more true; 5 – most true)

	Learning goals	1	2	3	4	5
1	Instant utility of newly acquired knowledge and information.					
2	Curiosity and seeking clarification.					
3	Expansion of existing knowledge and skills.					
4	Intent to obtain a certificate, degree.					
5	Chance of higher income.					
6	Finding a job through the studies.					
7	Hope of a better job.					
8	Seeking new company, meeting new people.					
9	Elaborating on an interest, a hobby.					
10	Meeting the employer's requirements.					
11	I like learning, I always learn something.					
12	Family circumstances					
13	Other:					

2. What tools did you and do you utilise during learning?

(1 – least true; 2 – less true; 3 - neutral; 4 – more true; 5 – most true)

		1	2	3	4	5
1	Textbooks					
2	Newspaper and journal articles					
3	Other books and print materials					
4	The Internet (e.g. browsing online and online materials)					
5	Computers (e.g. teaching software)					
6	CDs /DVDs, software					
7	TV / radio programmes					
8	Multimedia/ e-learning material					
9	Other:					

3. Why did you choose learning as an adult?

(1 – least true; 2 – less true; 3 - neutral; 4 – more true; 5 – most true)

	Reasons for learning	1	2	3	4	5
1	I have time only now					
2	I have the financial background only now					
3	I have new interests					
4	It has become necessary just now					
5	I can feel the need for learning only now					
6	I deem it necessary at all ages, thus as an adult, too					
7	I have found a befitting training just now					
8	Adult learning methods are more attractive for me as opposed to traditional teaching methods					
9	Now I learn by own initiative					
10	I find it to be a useful pastime activity					
11	Meeting new people and communities					
12	Other:					

4. What institutions have you utilised during your adult learning?

(1 – least true; 2 – less true; 3 - neutral; 4 – more true; 5 – most true)

		1	2	3	4	5
1	Trainings by adult educational institutions					
2	Trainings by tertiary institutions					
3	Trainings by secondary institutions					
4	Training courses by public cultural institutions (cultural centre, community house)					
5	Training courses by non-governmental organisations (associations, foundations)					
6	Training courses organised by the workplace					
7	Other:					

5. Before the training course did you know somebody from the group?

- 1 – no
- 2 – yes, 1 or 2 people
- 3 – yes, almost the entire group

6. What is the purpose of your studies? (*mark the most typical*)

- 1 – acquisition of first trade
- 2 – further training
- 3 – acquisition of a new trade, retraining
- 4 – individual interest, hobby
- 5 – acquisition of school qualifications (basic 8 forms, intermediate 12 forms – school leaving exam), higher education degree)
- 6 – other.....

7. Who finances the training (*mark the most typical*)

- 1 – workplace
- 2 – system of labour institutions
- 3 – tender funds
- 4 – state – free training due to network of public educational institutions (support of acquired school qualifications)
- 5 – self-funding
- 6 – several financers:.....
- 7 – other.....

8. The following statements are about the main reasons for adults' learning today: rank in order of importance to you! (1 – least true; 2 – less true; 3 - neutral; 4 – more true; 5 – most true)

	1	2	3	4	5
1 the workplace requires professional training or retraining	1	2	3	4	5
2 wishes to improve salary as an employee	1	2	3	4	5
3 desire to know more, cultural interest	1	2	3	4	5
4 avoiding loneliness, belonging to a group	1	2	3	4	5
5 continuous learning is a condition of entry into or staying in the labour market	1	2	3	4	5
6 reinforcing confidence	1	2	3	4	5
7 wishes to work in a special job as a disadvantaged person	1	2	3	4	5
8 'second chance', obtaining a previously unavailable qualification	1	2	3	4	5
9 recognition, success, career, social position	1	2	3	4	5

9. Rank the following in accordance with how much you agree with them. (1 – fully disagree; 2- mostly disagree; 3 – neutral; 4 – mostly agree; 5 – fully agree)

	1	2	3	4	5
1. I learn so that my family will be proud of me.	1	2	3	4	5
2. I learn to be able to hold down my job.	1	2	3	4	5
3. I learn to make new friends.	1	2	3	4	5
4. I learn because I need the new knowledge.	1	2	3	4	5
5. I learn to have a higher salary.	1	2	3	4	5
6. I learn because I am interested in what I can learn as new knowledge.	1	2	3	4	5
7. I learn because today it is inevitable to update your knowledge.	1	2	3	4	5
8. I learn to find a job.	1	2	3	4	5
9. I learn to make my life more varied and interesting.	1	2	3	4	5
10. I learn because I enjoy it.	1	2	3	4	5

10. Of the following what hinders learning most?

(1 – least hinders; 2 – slightly hinders; 3 - neutral; 4 - hinders; 5 – most hinders)

		1	2	3	4	5
1	Workplace duties					
2	Responsibilities to family, friends					
3	Household chores					
4	Personal, health problems					
5	Learning failures					
6	Financial difficulties					
7	Hobby					
8	Lack of motivation					
9	Strict roster rules of the chosen training					
10	Schedule of the chosen training					
11	Requirements of the chosen training					
12	Length of the chosen training					
13	Teaching methods of the chosen training					
14	Other:					

11. Who do you discuss your questions and problems arising during learning with?(1 – least true; 2 – less true; 3- neutral; 4 – more true; 5 – most true)

		1	2	3	4	5
1	A spouse or partner					
2	A friend					
3	A colleague or supervisor					
4	With a study partner, ex-schoolmate, classmate					
5	Family members, relations					
6	A neighbour					
7	A correspondent in an email					
8	A counselling institution					
9	A professional					
10	The teacher					
11	I do not speak to anyone					
12	Other:					

12. What is your most poignant memory of an adult learning success?

13. What is your most poignant memory of an adult learning failure?

14. With respect to the organisation of learning, what techniques do you like best?

(1 – least true; 2 – less true; 3 neutral; 4 – more true; 5- most true)

		1	2	3	4	5
1	Large groups					
2	Small groups					
3	Pairwork					
4	Individual					
5	Other:.....					

15. With respect to teaching methods, which methods do you most like using to learn? (1 – least true; 2 – less true; 3 neutral; 4 – more true; 5- most true)

		1	2	3	4	5
1	Presentations					
2	Training					
3	Debate techniques					
4	Groupwork					
5	Demonstration					
6	Discussion					
7	Situational methods, e.g. roleplay, case game					
8	Other:.....					

16. How do you see your school years as a child and young person from the perspective of success?

- 1 – I only have positive memories.
- 2 – I have mainly positive memories.
- 3 – I have both positive and negative memories.
- 4 – I have more negative memories.
- 5 – I only have negative memories.

17. What was your achievement like during school years?

- 1 - poor
- 2 – below average
- 3 - average
- 4 - good
- 5 – very good
- 6 - excellent

18. How important do you think the following factors are from the perspective of adult learning?

(1 – least important; 2 – less important; 3 - neutral; 4 – more important; 5 – most important)

		1	2	3	4	5
1	Group atmosphere					
2	Independence					
3	Assessment and feedback					
4	Utility of the teaching material					
5	Intriguing teaching material					
6	Diversity of teaching methods					
7	Personal consultation with teachers					

19. Are you a member of any organisation, group, club or association?

- 1 – yes
- 2 – no

20. What organisation(s) (formal, e.g. association, or informal) are you a member of? (*multiple options*)

0 – not a member

1 – cultural or art group or association,

2 – sports association

3 – environmental association,

4 – municipal development group or association,

5 – recreational association

7 – other:

Studies of life-long learning, as well as analyses of policy-making in the field, call attention to the fact that that school qualifications have a defining role in social mobility and the securing of equal opportunities. Our everyday lives regularly present changes that necessitate the continuous learning of the individual, and therefore it is crucial that the supply of opportunities for learning should be in step with the increase of demands for learning.

The goal of the project entitled 'Learning Communities and Social Transformation – Research Findings in Central and Eastern Europe' was to examine the role of learning, adults' learning and community learning in a given community and region, and the forms of learning that can contribute to development in individual regions. Several different tools were used for this end, including field trips, workshops, compiling a bibliography of professional literature and a database of the organisations, collecting good practices, making methodological recommendations, research.

This volume presents the findings of the research. During our study the aim was to learn about the processes of learning in partner countries, to explore learners' motivations for and hindrances to learning and training, and to map their interests. We investigated the subject matters, the institutions, the funds and methods of adults' learning in the given regions, as well as the factors that influence their willingness to learn.



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